

Ski tourists in Norway 2024

Findings from the 2024 Winter
Season Tourism Survey



Epinion



Ski Tourism in Norway 2024 Winter Season

The purpose of this report is to provide an insight into ski tourism in Norway during the 2024 winter season and to provide some insight into findings relating to potential ski tourists from Innovation Norway's [target group study](#).

The Tourism Survey is an important source of insight on tourism in Norway. Interviews are conducted with Norwegian and international tourists throughout the entire country, all year round. This report focuses on international ski tourists visiting Norway between January and April 2024. In this report you can read more about how much money the tourists spend, where they come from, what they do during their holidays and how happy they are with the various aspects of the offerings and their holidays overall.

The data collection was conducted by Norstat and the report has been drawn up by Epinion and Gyger in close collaboration with Innovation Norway.

The report is divided into six different insight topics from the Tourism Survey. The market potential for ski tourism has been determined based on the target group study. The appendix includes an overview of survey data, as well as further specification of how weighting and expenditure were calculated.

Contents

Topic 1: The Ski Tourist in Norway – an overview

Definition of ski tourists and key characteristics of international ski tourists visiting Norway during the 2024 winter season.

Topic 2: Expenditure and payment methods

How much money do the different types of ski tourists spend and what payment methods do they use during their holidays?

Topic 3: Activities and experiences

What do ski tourists do during their holidays? What are the motivations for choosing these activities and experiences in particular?

Topic 4: Satisfaction and willingness to recommend

How satisfied are the tourists with the tourism offerings and their holidays overall? Would they recommend Norway as a travel destination?

Topic 5: Sustainability and Ski Tourism

To what extent do ski tourists consider nature and the climate when planning their journey and their holidays? How does this affect the choices they make during their holidays in Norway?

Topic 6: Market potential for skiing holidays in Norway

What is the potential for ski tourism in neighbouring European markets? Summary of the findings from Innovation Norway's target group study.

Appendix: Data, methodology and definitions

Overview of data, number of interviews and methodology for the weighting of data.

Summary of findings

Value for money

Half of Danish winter tourists are very satisfied with the price in terms of the quality of their skiing holidays in Norway. This is a much higher level than before the pandemic.

No less than 39 per cent of all ski tourists are very satisfied with the price in relation to quality. This figure was only 12 per cent during the winter of 2019.

Although ski tourists get more for their money when holidaying in Norway, 43 per cent of Danish ski tourists say that "Good food at restaurants and eateries" is not relevant to their holidays when asked about satisfaction. There is still great potential for getting Danish ski tourists to participate more in the tourism offerings available at skiing destinations.

Cross-country and alpine skiing

The vast majority (77%) of ski tourists participate in alpine skiing during their holidays in Norway. 1 in 4 alpine tourists also participate in cross-country skiing.

34% of ski tourists participate in cross-country skiing. 6 in 10 cross-country ski tourists also participate in alpine skiing. This means that only 14 per cent of ski tourists participate in cross-country skiing only and do not combine it with alpine skiing.

The tourists who visit Norway from countries outside of Scandinavia increasingly participate in cross-country skiing and are more interested in experiencing many types of outdoor activities and cultural offerings during their holidays in Norway.

Expenditure has increased

Daily expenditure per person remains relatively stable compared to 2019, but the total expenditure per person and per travel party has increased considerably compared to 2019. This is because skiing holidays have become longer and travel parties have become larger following the pandemic.

There are considerably more families with children choosing to take their skiing holidays in Norway. In 2024, 43 per cent of respondents were travelling with children compared to only 25 per cent in 2019. Families with children largely stay at rented cabins and share expenses between multiple people. This results in lower expenditure per person but higher expenditure for the travel party. Additionally, if the holidays are increased by one additional day compared to 2019, expenditure increases even if daily expenditure remains stable.

More people purchasing package holidays

1 in 3 ski tourists say that they purchased the entire (13%) or parts (23%) of their holiday as a package holiday. The proportion of respondents purchasing package holidays has doubled from 2019 to 2024. This also means that a greater proportion of expenditure on the holiday is linked to the package holiday. Every four kroner spent on skiing holidays in Norway are spent on a package holiday. 1 in 3 ski tourists purchase packages that include accommodation (95%), transport to Norway (60%) and lift passes/ski school (50%). A minority state that the packages also include meals or other activities, especially among cross-country skiers.



Topic 1:

Ski Tourists in Norway – an overview

Definition of ski tourists and key characteristics of international ski tourists visiting Norway during the 2024 winter season.

Topic 1: Ski Tourists in Norway – an overview

Definitions of ski tourists, cross-country tourists, alpine tourists and pure alpine tourists

In this report, we distinguish between three types of ski tourists: cross-country tourists, alpine tourists on short breaks and alpine tourists on long breaks.

Approximately 20 per cent of ski tourists participate in both alpine and cross-country skiing and these tourists end up in both the group for alpine tourists and the group for cross-country tourists.

There is also a group of ski tourists that participate in neither cross-country nor alpine skiing but who have responded that they participate in other skiing activities, such as ski school, randonné skiing or summit ski trips. These tourists account for 9 per cent of ski tourists and have been included in the total overview of ski tourists but are not included in the cross-country or alpine groups.



Have you already, or do you intend to do any of the following outdoor activities on this trip in Norway?

Hiking/
walks

Experiences in
nature

Skiing

Fishing

Water
activities

Cycling/
road cycling



Ski tourist in Norway

A ski tourist is defined as an international holidaymaker who has stated that they have participated in at least one skiing activity during their holidays in Norway.



Can you go into more detail regarding the **skiing activities** you have done or plan to do?



Alpine tourists

A ski tourist who has responded that they have or intend to participate in alpine skiing/snowboarding during this holiday in Norway



Alpine tourists on short breaks

An alpine tourist staying for
6 or fewer nights



Alpine tourists on long breaks

An alpine tourist staying for
7 or more nights



Cross-country tourists

A ski tourist who has responded that they have participated in or intend to participate in cross-country skiing during this holiday in Norway.

Topic 1: Ski Tourists in Norway – an overview

What skiing activities do ski tourists participate in?

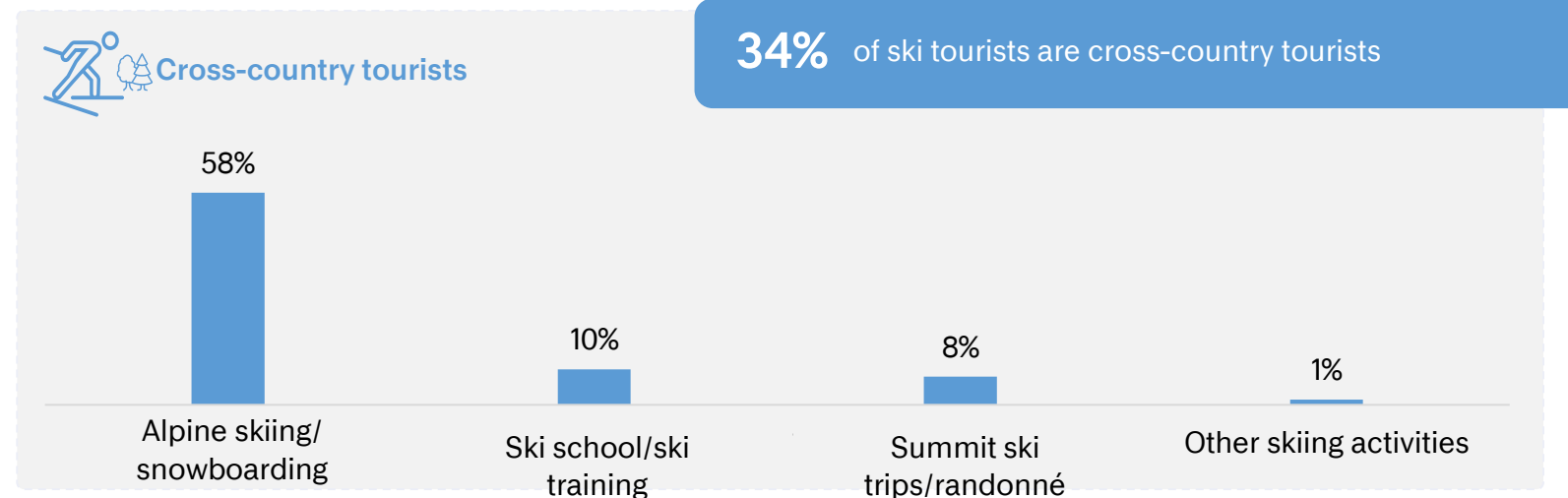
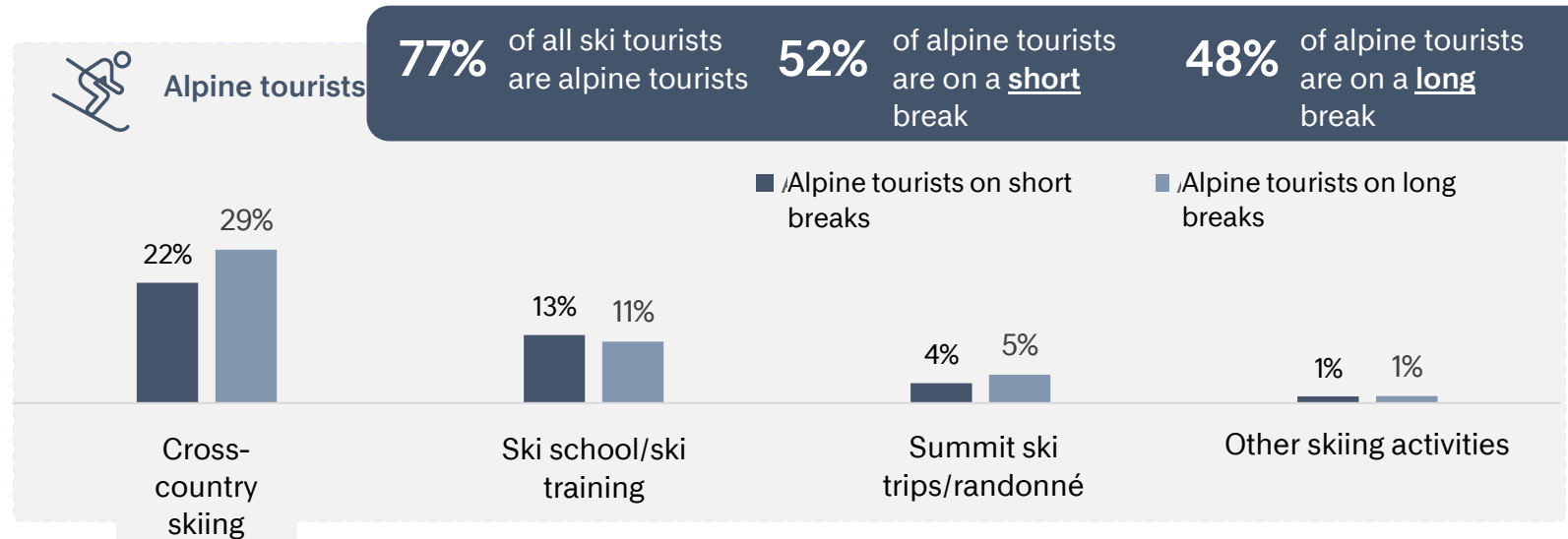
The majority of people participating in cross-country skiing also participate in alpine skiing. It may therefore seem a bit strange to refer to them as cross-country tourists. Cross-country tourists differ from alpine tourists in so far that they are more open to activities and experiences other than skiing activities. They participate in more types of activities and take longer holidays in Norway than those who do not participate in cross-country skiing.

Cross-country tourists are more likely to come from Germany, the UK and the USA, but Denmark and Sweden remain by far the largest markets also for cross-country tourists.

The youngest ski tourists, including both cross-country and alpine tourists, are more interested in combining skiing with other activities and experiences than older ski tourists and those travelling with children.

Short alpine holidays are those that entail 6 or fewer nights and long alpine holidays entail 7 or more nights. 29% of alpine tourists stay for 7 nights. This means that six in ten of the group that take long alpine holidays in Norway spend a week here.

What other skiing activities do cross-country tourists participate in or intend to participate in?



Topic 1: Ski Tourists in Norway – an overview


Characteristics of alpine tourists on short breaks in Norway

Alpine tourists on short breaks have a higher daily expenditure and are more likely to buy package holidays. Many people purchase package holidays that include transport to Norway.


Alpine tourists on shorter holidays primarily travel to ski and participate in few activities that are not ski-related during their holidays.

The majority (52%) travel with children and 18 per cent of Danish tourists attend ski school.


These tourists have a low NPS* compared to other groups of tourists. There are many Swedes (which brings the NPS down). They are less satisfied with the weather but very satisfied with the price in relation to quality.




1 in 4 plan to **ski only** and are not planning any other activities




Half of the tourists would **highly recommend Norway** as a destination



Half travel with **children**




Half of overnight accommodation was in **rented cabins**




They want to **experience quality time** with others



Foreign alpine tourists on short breaks



Alpine tourists want to be **physically active** and use **their bodies** and are more interested in **adrenaline and excitement**



They frequently travel to **Norway**, more than half visit Norway **one or more times** each year

Topic 1: Ski Tourists in Norway – an overview

Characteristics of alpine tourists on long breaks in Norway

Alpine tourists on skiing holidays with 7 or more overnight stays spend less money per day but stay for slightly longer, thereby spending more money overall on their holidays in Norway. 1 in 4 have purchased a package holiday, significantly fewer than for those on short breaks.

Danish and Swedish ski tourists account for a smaller share of tourists, 65 per cent of long breaks and 80 per cent of alpine tourists on short breaks.

Alpine tourists on long breaks want to be physically active, but few participate in activities (only 2.4 different activities). Alpine is the primary activity.

They are younger than tourists on short breaks, 6 in 10 are below the age of 40 years. There are fewer families with children (40%) and 1 in 3 travel with friends. They are more open to different types of activities and experiences than alpine tourists on short breaks.



Foreign alpine tourists on long breaks

They are more likely to visit **Oslo and Western Norway**.



Nearly half of the alpine tourists would **highly recommend Norway as a destination**



They are very satisfied with an **attractive activity offer**



1 in 4 are visiting Norway for the **first time**



1 in 3 travel with friends



Half want to **experience cold weather, snow and winter**. 1 in 4 want to try something new



Alpine tourists want to be **physically active and use their bodies** during the holidays



Topic 2: The characteristics of ski tourists in Norway

What characterises alpine tourists on short or long breaks?



55%
/ **47%**

Travel to Norway for
leisure or holidays
at least once a year



25%
/ **34%**

Under 30 years
of age



20%
/ **25%**

30-39 years
of age



22%
/ **16%**

40-49 years
of age



21%
/ **12%**

50-59 years
of age



13%
/ **13%**

Over 60 years
of age



4.9 / 4.9

Average number of
travelling companions*



42% / **24%**

Have purchased all
or part of the trip as
a package holiday

29% / **32%**

Travelling with friends



2.9 / 4.7

Average number of
activities**



4.6 / 9.4

Average number of
overnight stays in Norway

● Alpine tourists
on short breaks

● Alpine tourists on
long breaks

Travelling
with
children



52% / **45%**



women

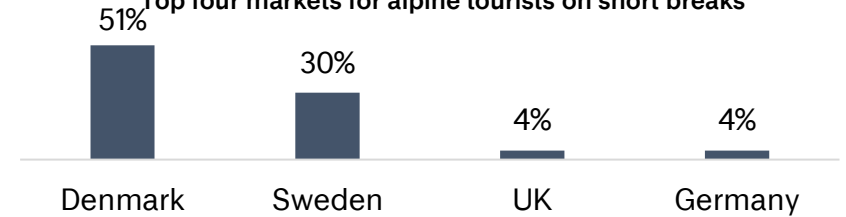
39% / **40%**



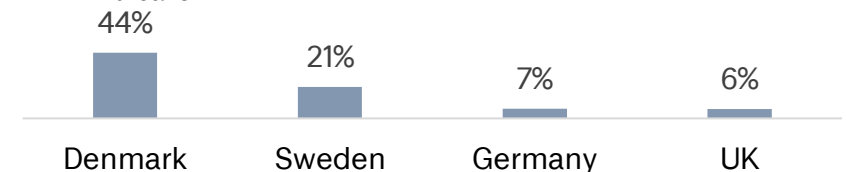
NOK 1525 /
NOK 925

Daily expenditure

Top four markets for alpine tourists on short breaks



Top four markets for cross-country tourists on long breaks



Topic 1: Ski Tourists in Norway – an overview

Characteristics of foreign cross-country tourists

6 in 10 cross-country tourists also participate in alpine. They stay in Norway for longer and spend more money overall per person on their holidays.

They are more satisfied, more committed to sustainability and more willing to recommend Norway as a holiday destination to others. At the same time, only 34 per cent state that they are very satisfied with the options for experiencing local culture and lifestyles.

The majority (55%) come from Sweden and Denmark, but the proportion from neighbouring countries is lower for this type of holiday than for alpine. They are more interested in combining skiing activities with cultural experiences during their holidays.

The cross-country tourist is older than the alpine tourist, 4 in 10 are over the age of 50 years. They are more interested in peace and quiet and prefer these ahead of adrenaline and excitement. 1 in 4 have visited Oslo and they increasingly arrive in Norway by plane (39%).



Want to experience a **wider range of activities and experiences** during their holidays than alpine tourists



They are **older** than alpine tourists and travel **without children** to a greater extent



About 1 in 3 cross-country tourists looked into **sustainability** when planning their holidays in Norway



They are **ambassadors for Norway** and **recommend Norway as a destination** to a greater extent than alpine tourists



Originate to a greater extent from countries **outside Scandinavia**

Foreign cross-country tourists



4 in 10 travel to Norway by plane



The cross-country tourist increasingly looks for **peace and quiet, nature experiences** and is curious about Norwegian outdoor life

Topic 2: The characteristics of ski tourists in Norway

What are the characteristics of alpine and cross-country tourists?

● Alpine tourists / ● Cross-country tourists



51%
/ 56%

Travel to Norway for
leisure or holidays
at least once a year



29%
/ 22%
Under 30
years of age



22%
/ 23%
30-39 years
of age



19%
/ 17%
40-49 years
of age



17%
/ 20%
50-59 years
of age



13%
/ 18%
Over 60 years
of age



4.9 / 4.0

Average number of
travelling companions*



33% / 33%
Have purchased all
or part of the trip
as a package
holiday

30% / 26%

Travelling with friends



3.8 / 6.1

Average number
of activities**



6.9 / 8.2

Average number of
overnight stays in Norway

Travelling
with
children



49% / 38%



women

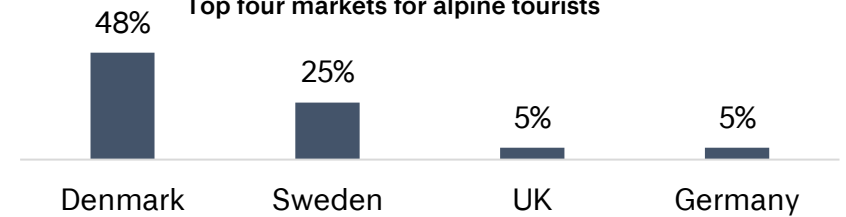
40% / 42%



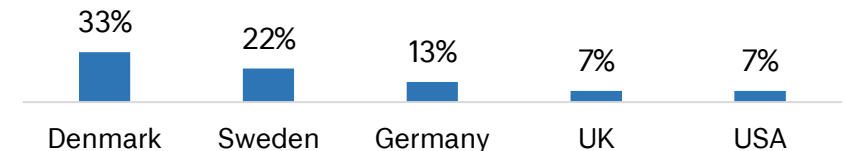
NOK 1,235 /
NOK 1,370

Daily expenditure

Top four markets for alpine tourists



Top five markets for cross-country tourists



*Travelling companions indicates the total number of people travelling together as a group, not only the part of the group with joint finances.

** The average number of activities per day is calculated as the average number of activities respondents participate in or plan to participate in of all specified winter and cultural activities



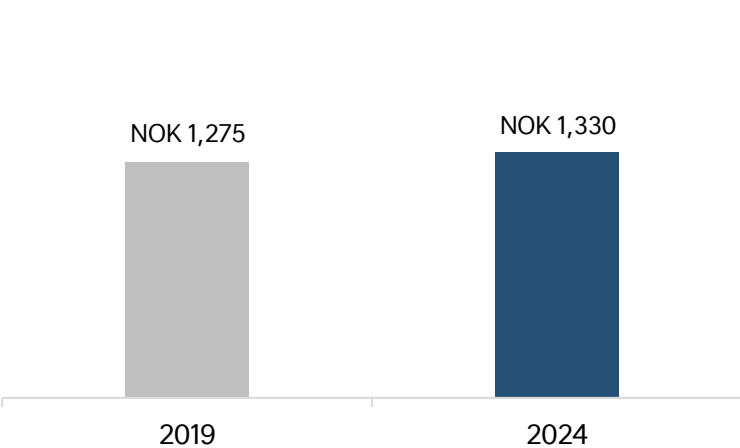
Topic 2: **Expenditure and payment methods**

How much money does the ski
tourist spend and what payment
methods
do they use during their holidays?

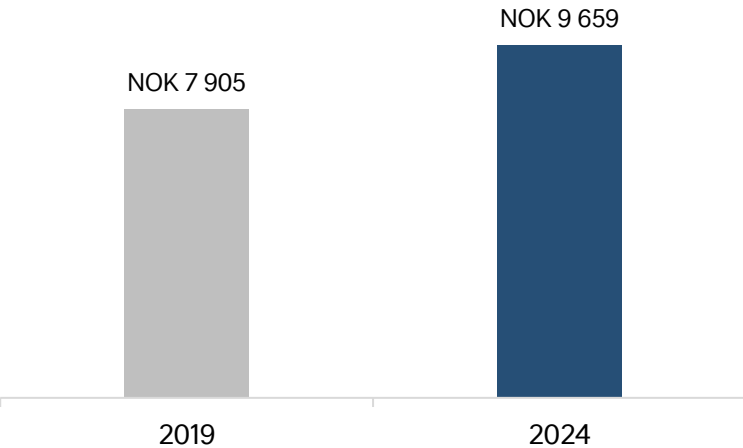
The daily expenditure of the ski tourist

Daily expenditure is at around the same level as in 2019. This is primarily due to the fact that the number of people in the group has increased by one person from 2.1 to 3.1 people sharing expenses. There are more people to share costs with for accommodation and transport. Just over half of all overnight stays take place either in rented cabins (42%) or through privately rented accommodation (12%). In 2019, 25 per cent of foreign ski tourists were families with children, this increased to 43 per cent in 2024. This is the main reason for the size of the group having increased since 2019 and also for expenditure for the group as a whole having increased significantly more than expenditure per person.

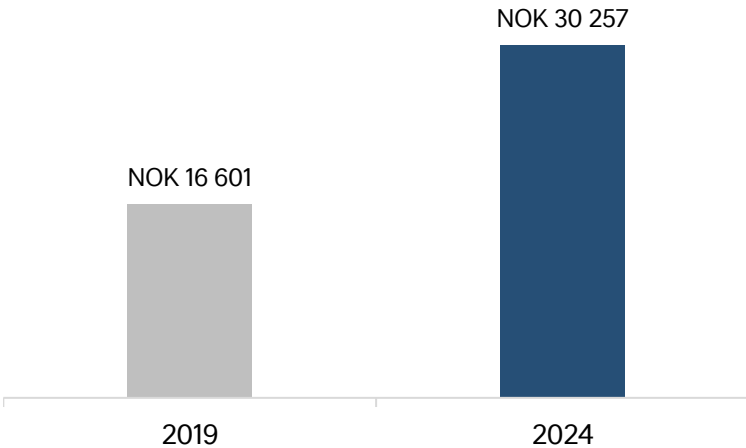
Average daily expenditure (NOK) per person for ski tourists



Average total expenditure (NOK) per person for ski tourists



Average total expenditure (NOK) for the entire group of travel companions



Calculation of daily expenditure and total expenditure:

Respondents have stated how much money they have spent on the trip to Norway overall and broken down by different expenditure items. Expenditure has been stated for the entire group sharing finances. Daily expenditure per person has been calculated by dividing by the number of travel companions and number of overnight stays. Expenditure has been controlled for typing errors and outliers (for both very low and very high expenditure).

Note: 19 per cent of ski tourists have purchased a package holiday that includes all or parts of their transport to Norway. For these tourists, transport to Norway has been included as part of the expenditure on the holiday. For other tourists, transport to Norway has not been included in the calculation of expenditure. A ski tourist has an average expenditure of NOK 1,755 for transport to Norway, which amounts to NOK 275 per day.

Topic 2: Expenditure and payment methods

Foreign ski tourists' expenditure by market

Ski tourists spend a much higher proportion of their expenditure on outdoor activities than other tourists who are visiting Norway.

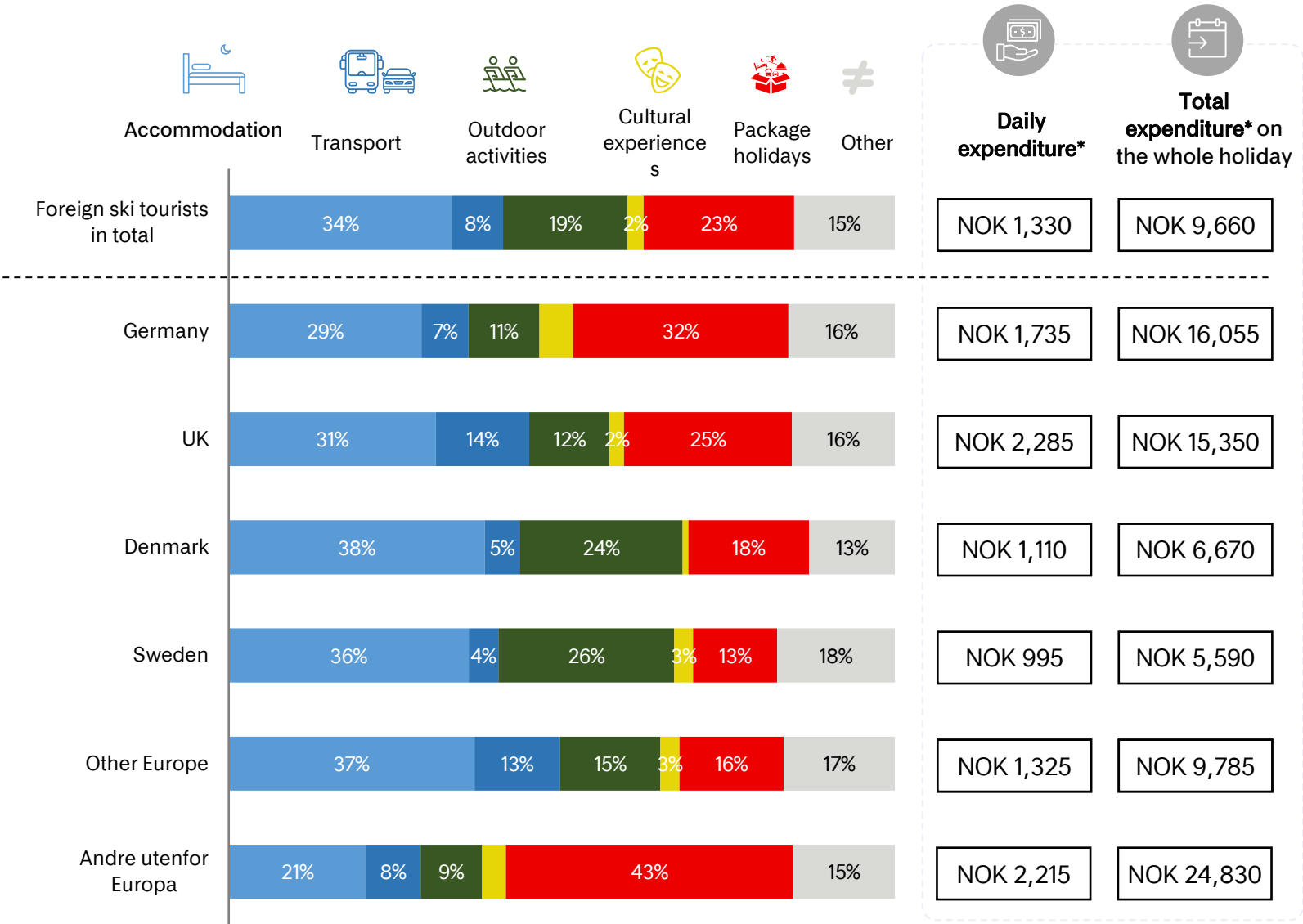
1 in 3 have purchased all or parts of the trip as part of a package holiday and the expenditure for the package accounts for 23 per cent of the expenditure of ski tourists.

Danish ski tourists differ significantly from British and German ski tourists.

90 per cent of overnight stays for Danish ski tourists take place in Eastern Norway and 2 in 3 overnight stays take place at rented cabins.

Ski tourists from the UK, however, spend 2 in 3 nights at a hotel and 55 per cent of overnight stays take place in Eastern Norway, while 16 per cent take place in Oslo, 15 per cent in Northern Norway and 13 per cent in Western Norway. Brits are less likely to travel with children (only 20 per cent) and are more likely to combine skiing with cultural experiences.

Average daily expenditure and total expenditure per person for ski tourists



Note: The percentages in the graphs have been rounded up. It is therefore possible that the numbers do not add up exactly to 100%. Percentages of or below 3% are not included.

Daily expenditure on transport to Norway is not included in the calculation of daily expenditure and total expenditure.

*The average expenditure has been rounded to the closest NOK 5.

Topic 2: Expenditure and payment methods

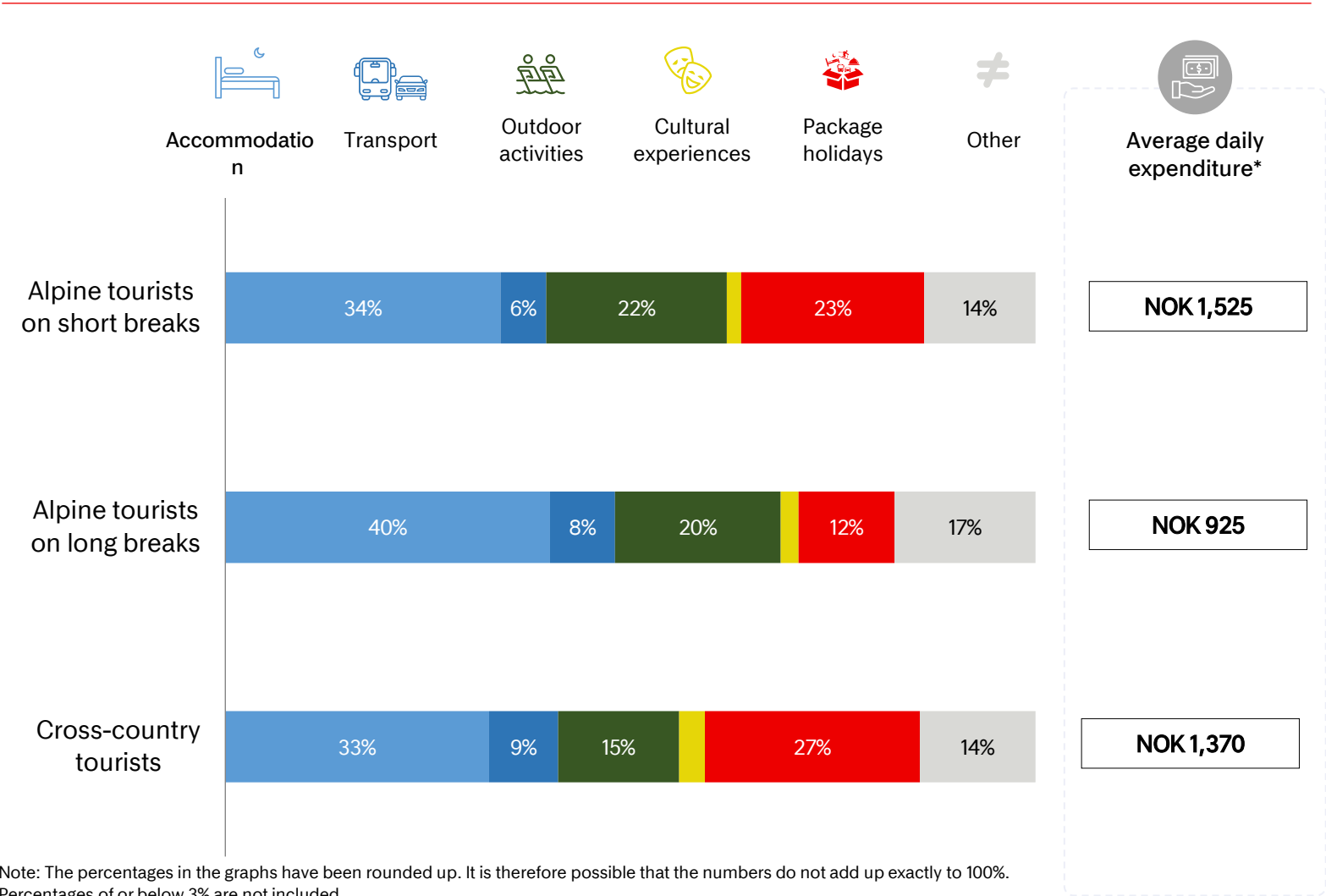
The daily expenditure of the ski tourist

Alpine tourists on short breaks are more likely to purchase a package holiday to Norway. They also have a larger group of travel companions than other groups. This also means that transport to Norway is included in the package. These tourists therefore have a higher expenditure as transport to Norway has been excluded from expenditure for those who for whom this is not included as part of a package holiday.

There are many families with children in this group and an average of 3.4 people have joint finances. This means that the average daily expenditure for a group of travel companions on a short alpine break is NOK 5,454, which is considerably higher than the other groups with smaller groups of travel companions.

Ski tourists spend just under 20 per cent of their budget on outdoor activities. This is high compared to other types of tourists visiting Norway.

Average daily expenditure per person for ski tourists



Note: The percentages in the graphs have been rounded up. It is therefore possible that the numbers do not add up exactly to 100%. Percentages of or below 3% are not included.
Daily expenditure on transport to Norway is not included in the calculation of daily expenditure and total expenditure.
*The average expenditure has been rounded to the closest NOK 5.

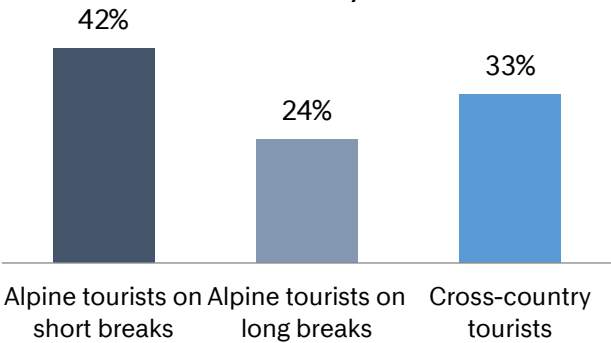
Topic 2: Expenditure and payment methods

What is included in the package holiday?

1 in 3 ski tourists purchase package holidays. Package holidays nearly always include accommodation at a hotel or rented cabin and the majority also include ski passes/ski school and transport to Norway in the package. Cross-country tourists are more likely to have food, activities and transport within Norway included as part of the package holiday.

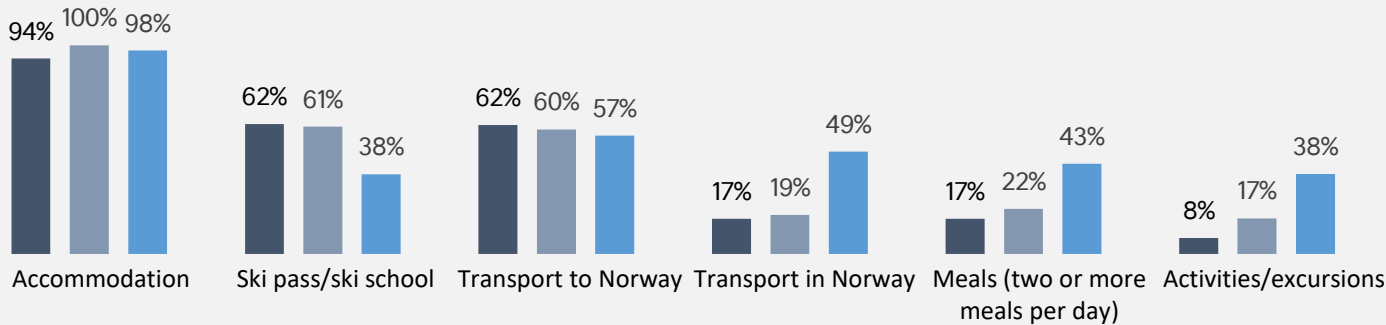


All or part of the trip purchased as a package holiday



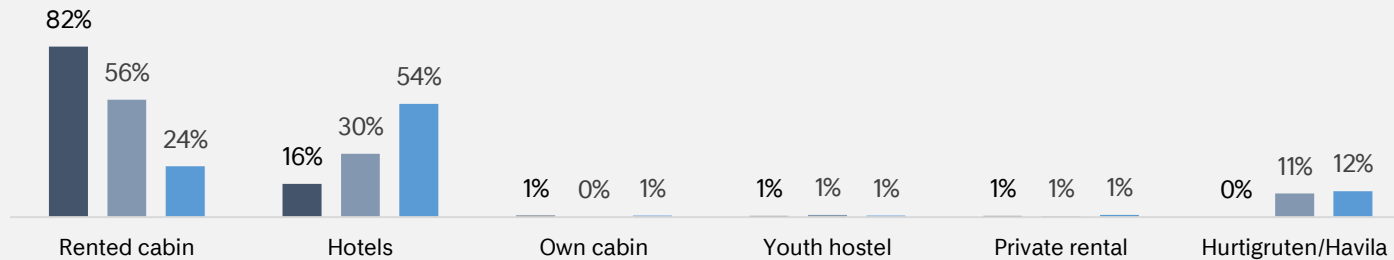
What is included in the package holiday?

The proportion of foreign ski tourists on package holidays who have stated that the activity was part of the package holiday



Breakdown of overnight stays by accommodation type

The proportion of foreign ski tourists on package holidays who have stated that accommodation was part of the package holiday

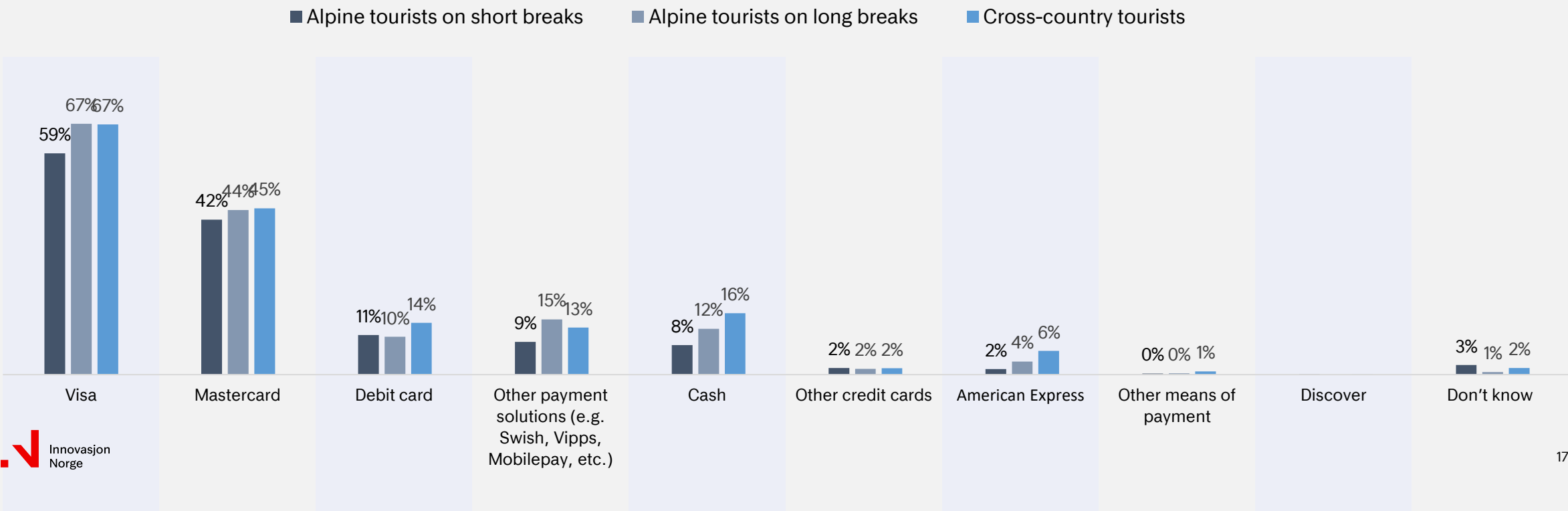


Note: 19 per cent of ski tourists have purchased a package holiday that includes all or parts of their transport to Norway. For these tourists, transport to Norway has been included as part of the expenditure on the holiday. For other tourists, transport to Norway has not been included in the calculation of expenditure. A ski tourist has an average expenditure of NOK 1,755 for transport to Norway, which amounts to NOK 275 per day.

Very few people use cash during their holidays in Norway

Foreign ski tourists primarily use Visa and Mastercard during their skiing holidays in Norway. 94% of ski tourists have paid either by Visa and/or Mastercard during their stay. Only just over 1 in 10 use cash. Cash expenditure has decreased compared to 2023.

What means of payment have you used in Norway on this trip?
The proportion of tourists who have stated that they used the means of payment





Topic 3: **Activities and experiences**

What motivations do ski tourists have in relation to experiences? What experiences do they participate in during their holidays in Norway?

Topic 3: Activities and experiences - Nature

Physical activity in cold weather, snow and winter

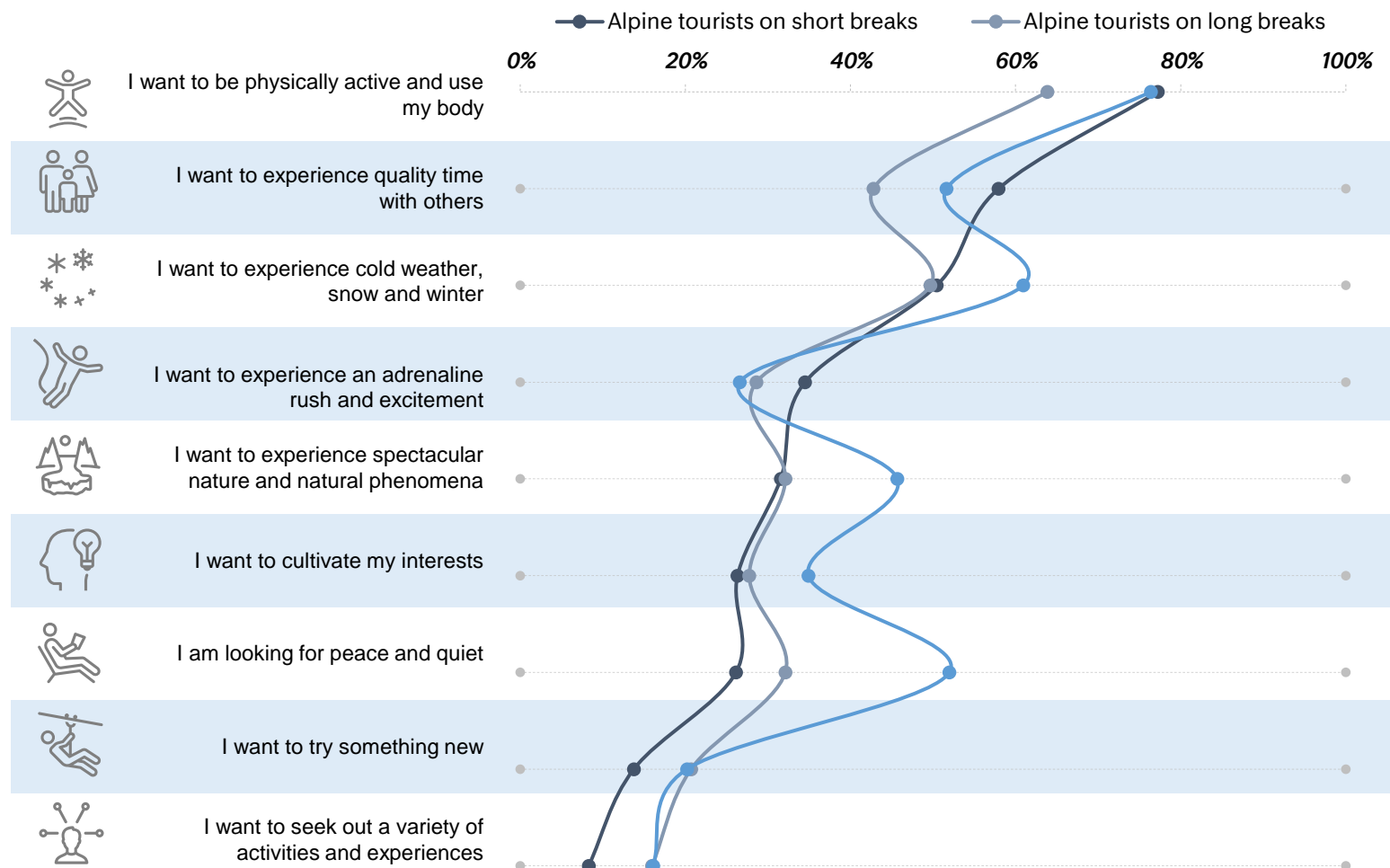
Being physically active and using their bodies is the main motivation for spending time outdoors for both alpine and cross-country tourists. Quality time is more important for alpine tourists on short breaks and they are less concerned about peace and quiet and more interested in adrenaline and excitement.

Tourists on longer breaks have more time, do more and are more interested in peace and quiet. This is especially true for tourists participating in cross-country skiing. The nature experiences themselves are more important to this group than for the alpine tourists.

Cold weather, winter and snow is an experience in itself and nearly as important as being active for cross-country tourists and more important than quality time with others for tourists on longer alpine breaks.

When you spend time out in nature on this holiday in Norway, which of the following statements best describes what you are looking for?

The proportion of tourists who selected "Yes".



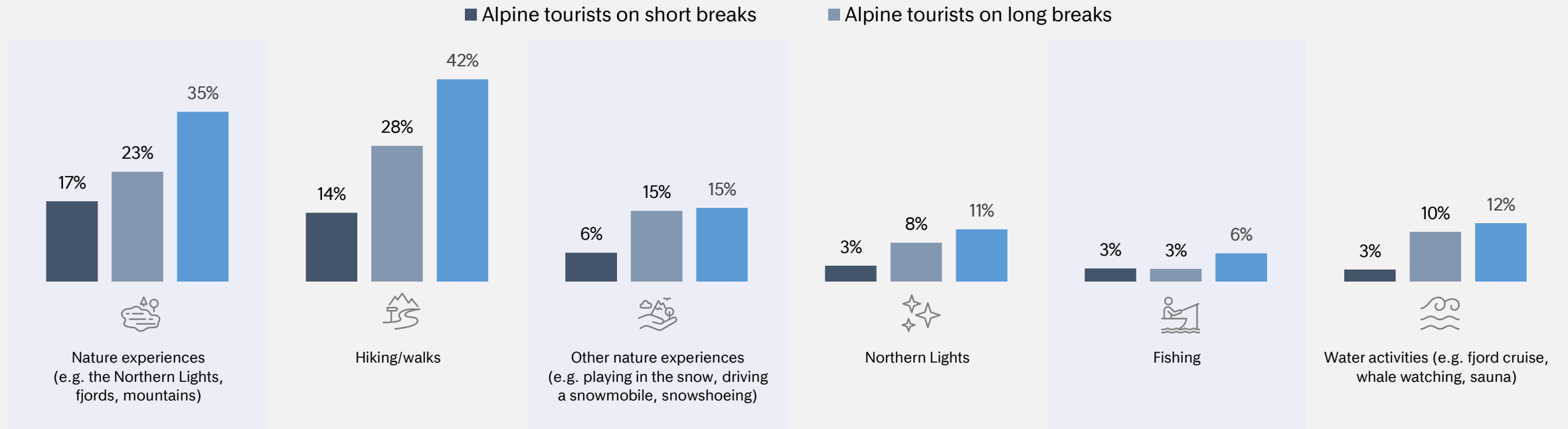
Topic 3: Activities and experiences - Nature

Ski tourists are primarily interested in skiing

Alpine tourists are much less interested in other types of activities and experiences than other foreign tourists. Only 2 in 10 are interested in nature experiences. Those who are on longer breaks participating in alpine skiing. Cross-country tourists often combine ski trips with hikes and a minority are also interested in cultural experiences during their holidays.

Have you done or are you planning to do any of the following activities on your holiday in Norway?

The proportion of tourists who answered that they have done or plan to do the following activities during their holidays



Topic 3: Activities and experiences - Nature

Ski tourists primarily want to participate in skiing activities

Alpine tourists on short and long breaks also participate in cross-country skiing and cross-country skiing is the second most important activity for both of these groups. For those on short breaks, 23 per cent participate in cross-country skiing and 28 per cent of those on long breaks also participate in cross-country.

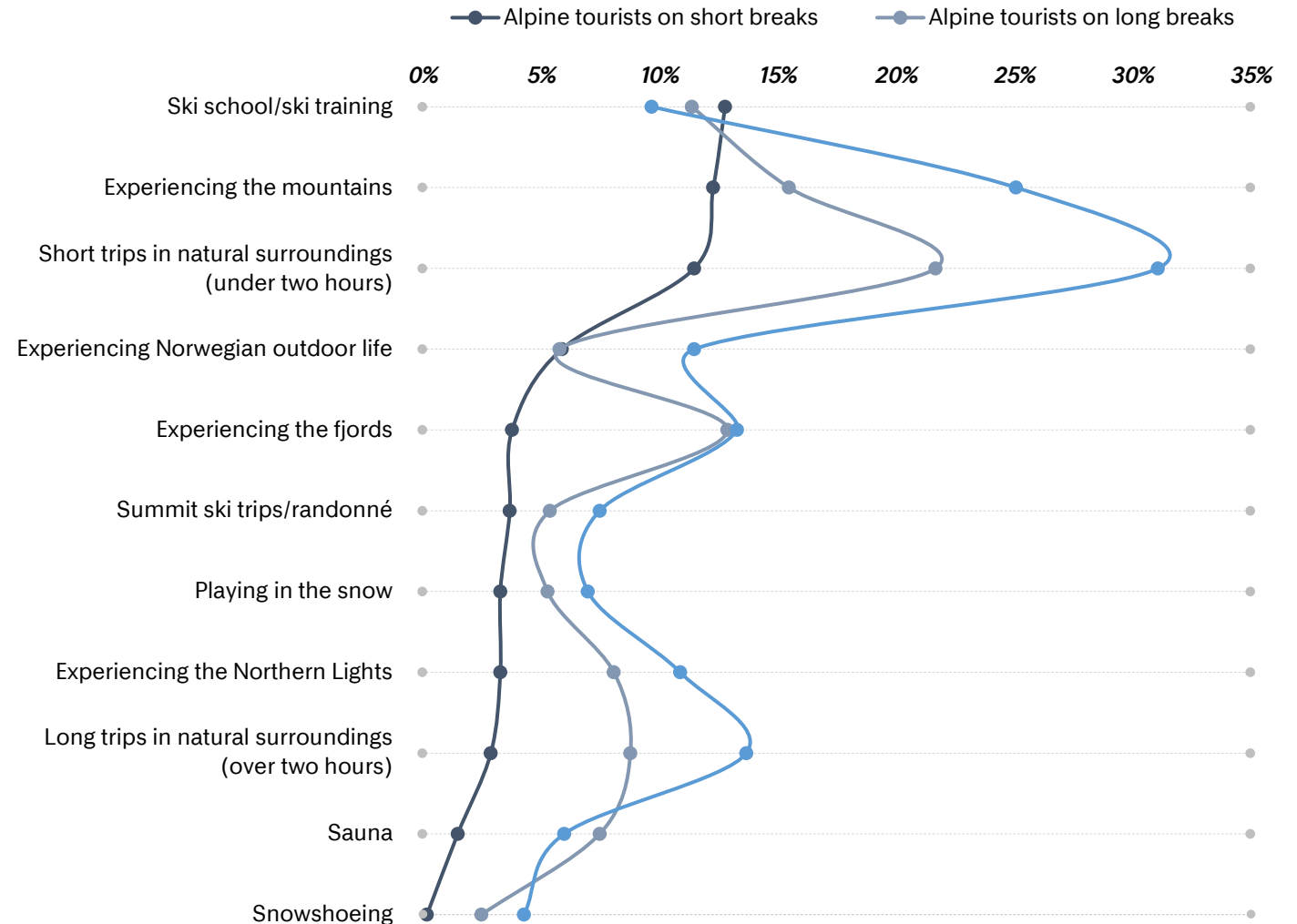
Just over 1 in 10 alpine tourists on short breaks participate in a ski school, want to experience the mountains and are interested in short walks. This means that 9 in 10 do not participate in these activities.

Cross-country tourists and alpine tourists on long breaks are somewhat more interested in doing other activities, but it is only walks and the mountains that more than 2 in 10 are interested in.

For ski tourists, activities that involve wearing skis are the most important activities during their holidays.

Can you go into more detail regarding the activities you have done or plan to do?

The proportion of tourists who answered that they have done or plan to do the following activities during their holidays

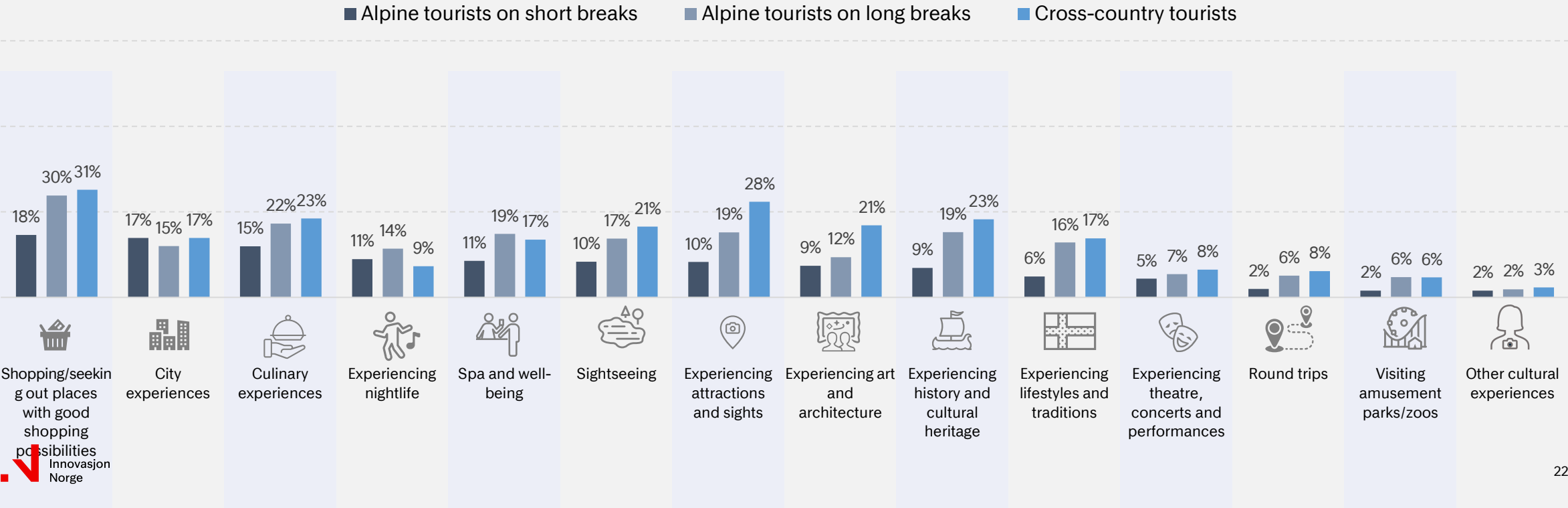


Ski tourists primarily want to ski

The youngest tourists are much more interested in combining skiing with other types of activities and experiences. Over 20 per cent of those under 40 years of age want spa and well-being and 22 per cent of those under 30 years of age want to experience the nightlife. Culinary experiences are also more important for younger tourists. Over 30 per cent of those under 30 and 26 per cent of those between 30 and 40 will prioritise culinary experiences during their skiing holidays.

Have you done or are you planning to do any of the following activities on your holiday in Norway?

The proportion of tourists who answered that they have done or plan to do the following activities during their holidays



Topic 3: Activities and experiences - Culture

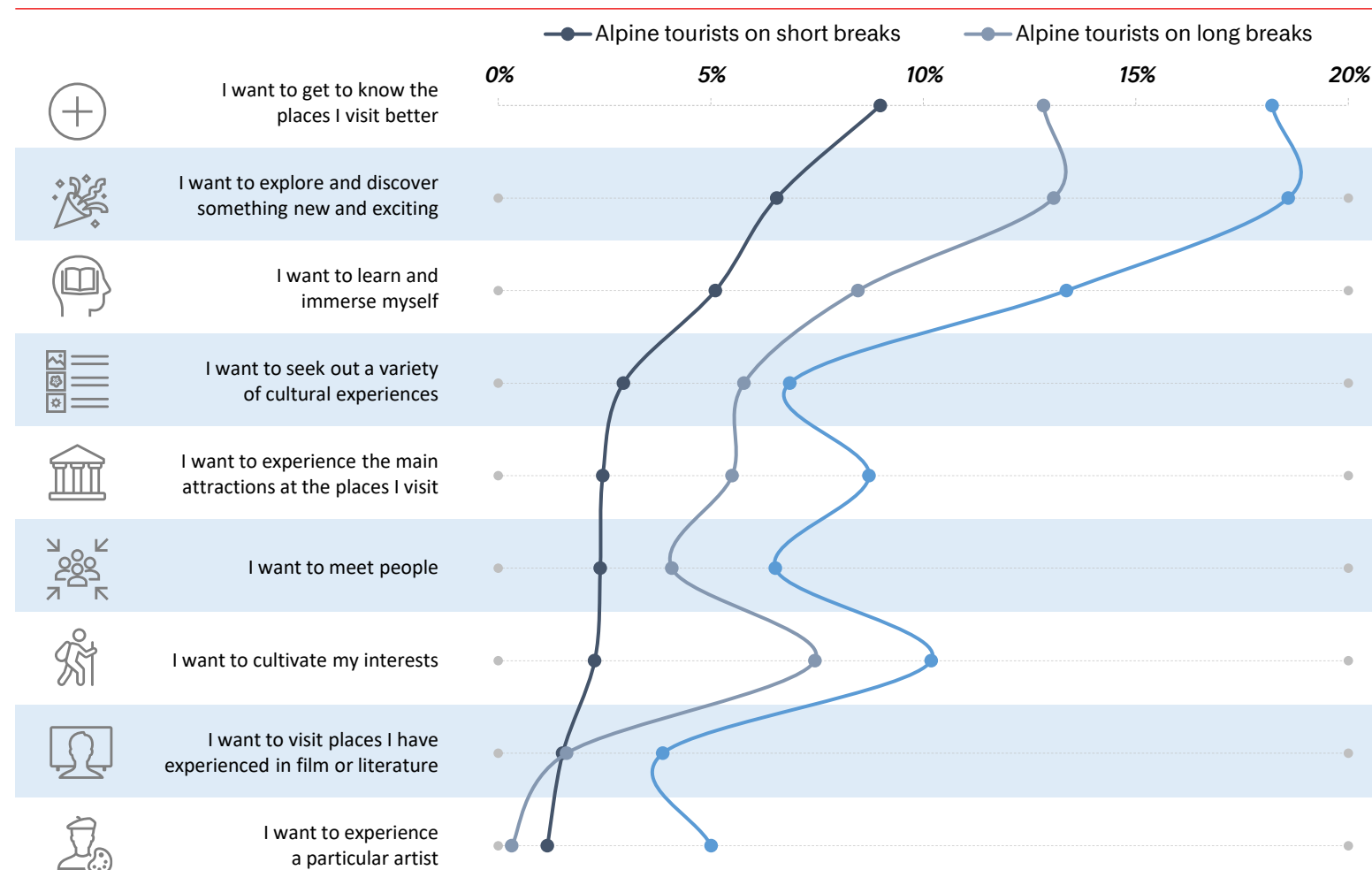
Alpine tourists visit for the slopes

Although ski tourists are primarily interested in alpine and cross-country skiing, 52 per cent of cross-country tourists, 46 per cent of alpine tourists on long breaks and 33 per cent of alpine tourists on short breaks are also interested in culture. This means that they are interested in experiencing either history and cultural heritage, art and architecture, attractions and sights, concerts, lifestyles and traditions and/or culinary experiences.

For cultural tourists, the motivation for seeking cultural experiences is primarily to get to know the places better and to explore something new and exciting. Many also combine skiing activities with the cultivation of cultural interests.

When seeking cultural experiences on this holiday in Norway, which of the following statements best describes what you are looking for?

The proportion of tourists who selected "Yes".



Topic 3: Activities and experiences - Culture

Cross-country tourists are more interested in cultural experiences

Among ski tourists, it is particularly those under 30 who want to combine skiing with cultural experiences.

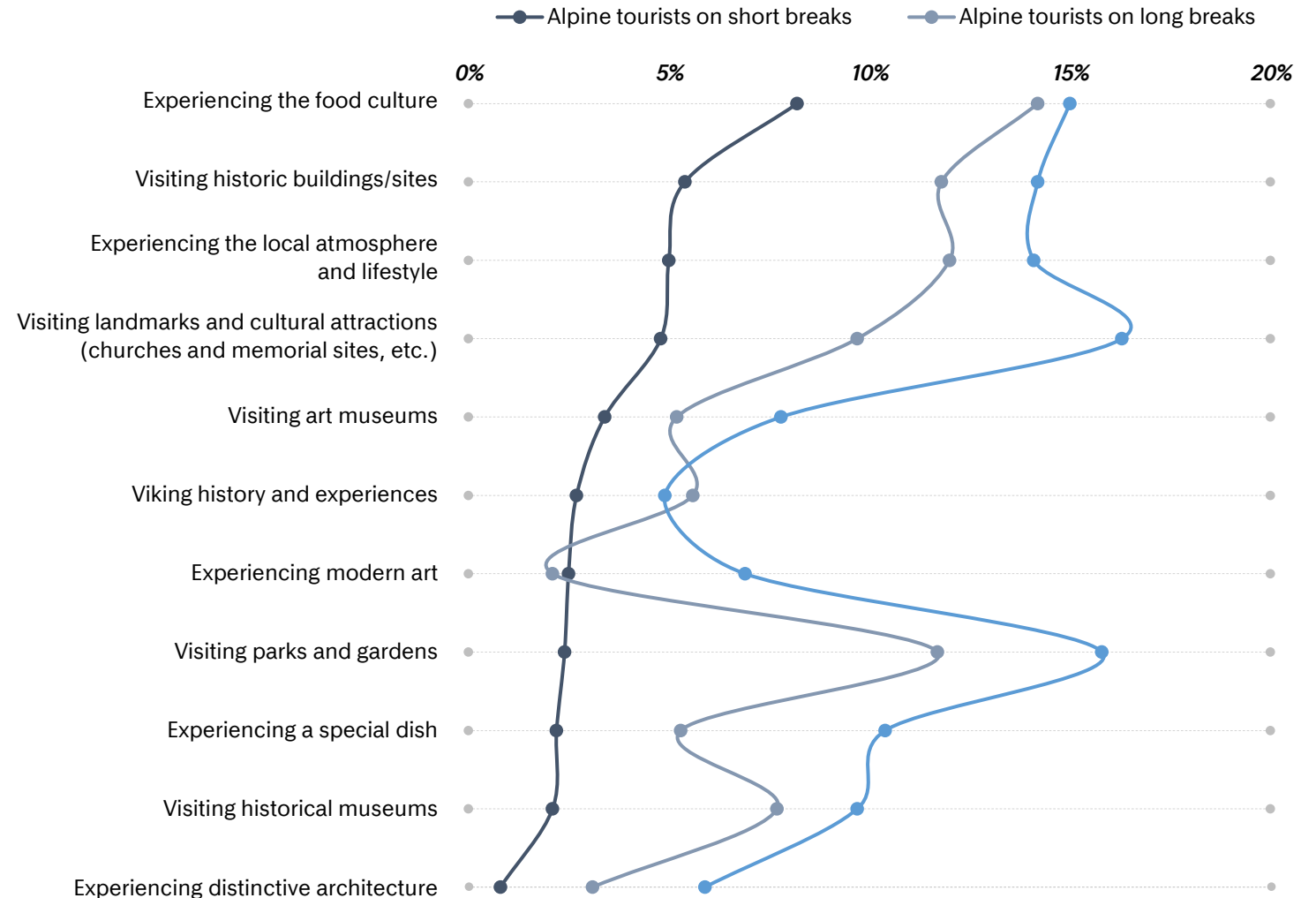
No less than 40 per cent of cultural tourists are under 30 years of age. They account for a smaller proportion of overnight stays in Eastern Norway. Tourists up to the age of 40 are more interested in culinary experiences and trying something new, both when outside in nature and when seeking out cultural experiences.

Cross-country tourists are more interested in cultural experiences than alpine tourists, especially alpine tourists on short breaks. It is important to note that none of the cultural experiences appeal to more than a small number of ski tourists.

Ski tourists who combine skiing with other outdoor activities or cultural activities are more likely to visit Oslo and Northern Norway than the ski destinations in Eastern Norway.

Can you go into more detail regarding the activities you have done or plan to do?

The proportion of tourists who answered that they have done or plan to do the following activities during their holidays





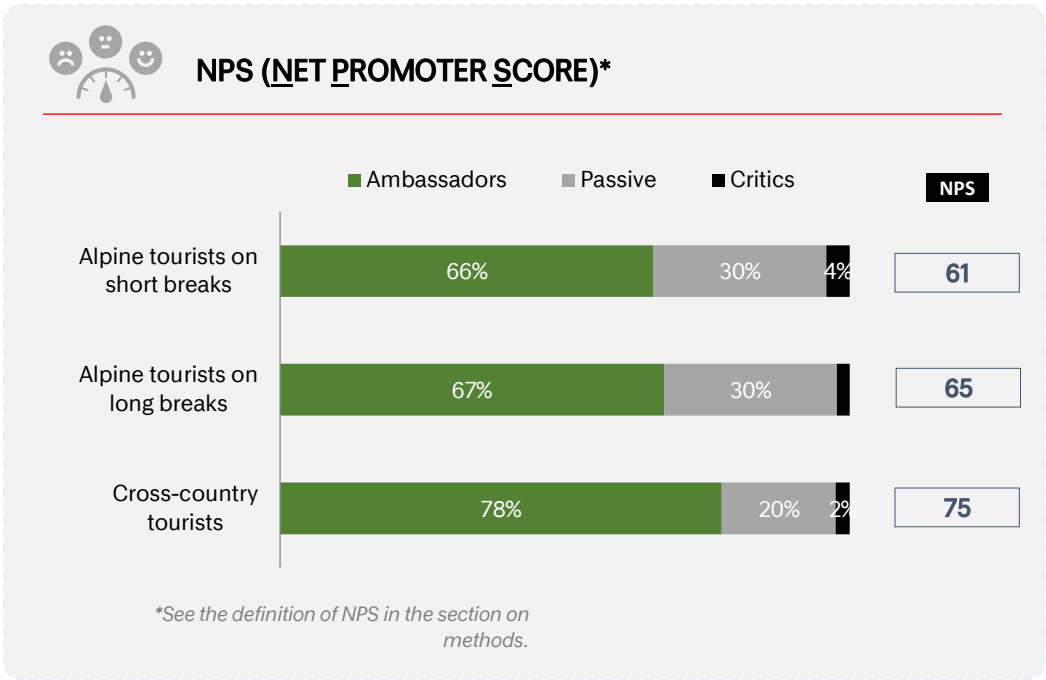
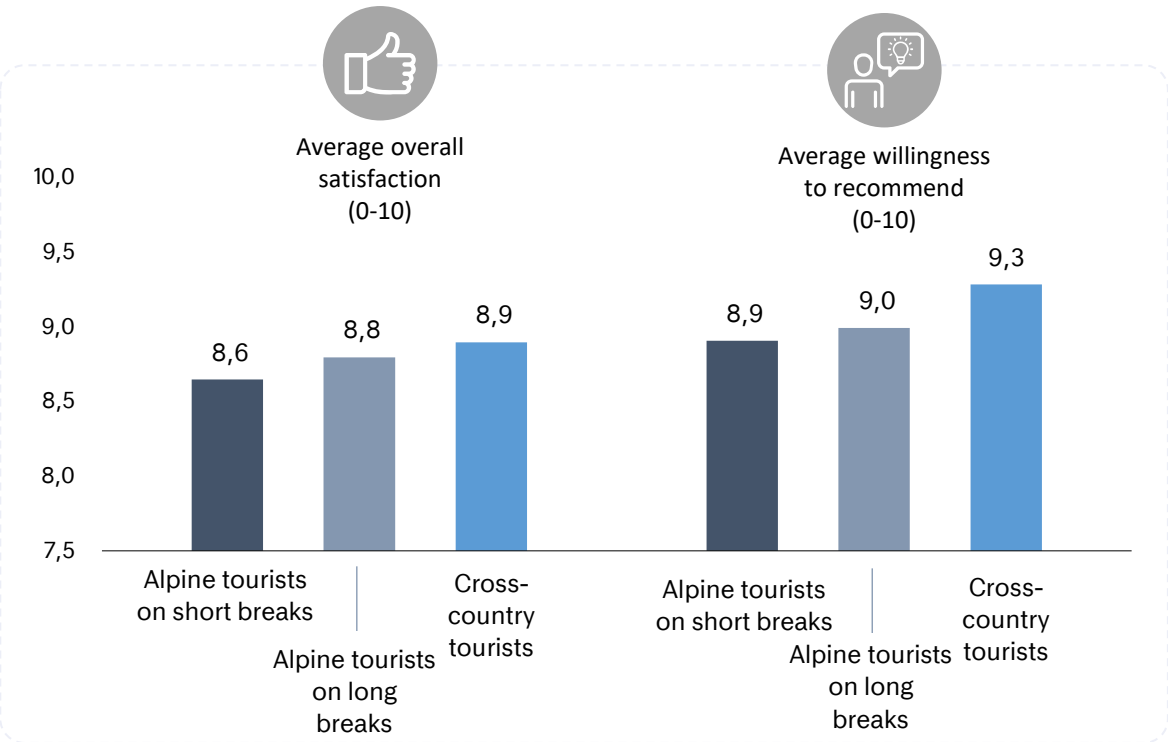
Topic 4: **Satisfaction and willingness to recommend**

How satisfied are ski tourists
with their holidays in Norway?

Topic 3: Activities and satisfaction

NPS is lower than before the pandemic

Both satisfaction and willingness to recommend are somewhat lower than before the pandemic. This is reflected in the NPS. Swedish ski tourists in particular pull the NPS down. Swedish ski tourists have an NPS of just 52, while the Danish is 69, German is 79 and British is 84. Regardless of season, it is much more difficult to get Swedes to become ambassadors for Norway as a destination. The NPS for Swedish ski tourists is at around the same level as it is in summer. The composition of guests, with a large proportion of Swedes (and Danes), means that the NPS is lower for ski tourists. At the same time, NPS is also considerably lower for the age groups below 50. Those over 50 have an NPS of 72 and this group includes more cross-country tourists and a smaller proportion of Swedish ski tourists.



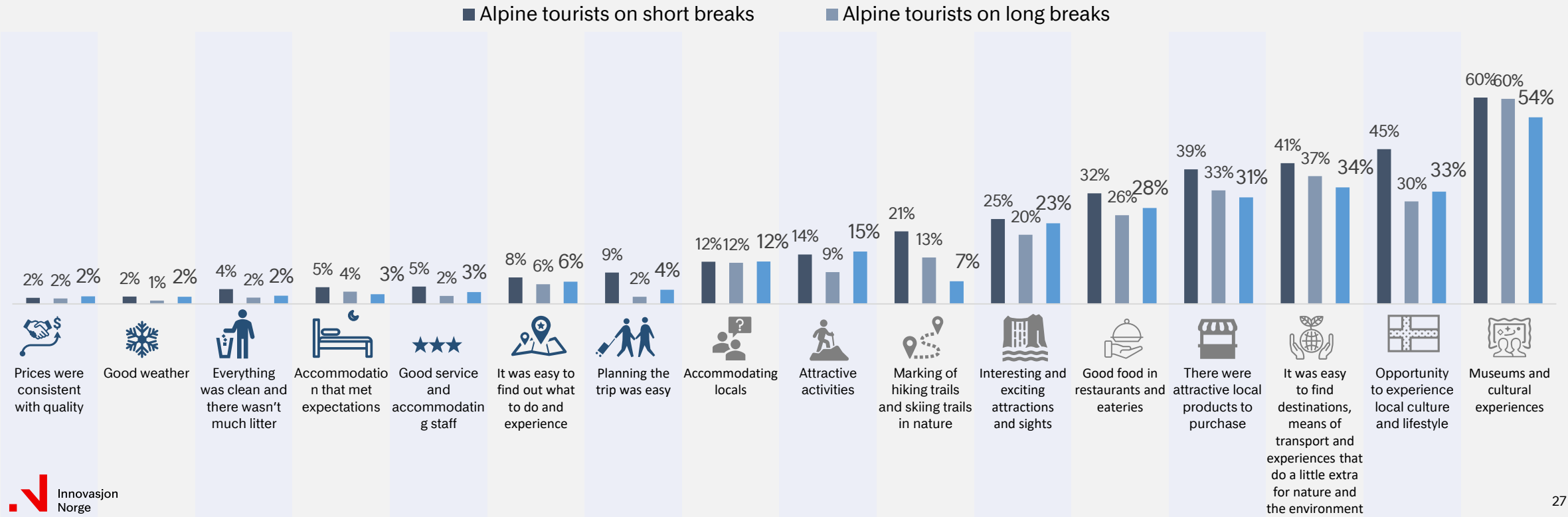
Topic 3: Activities and satisfaction

Good food at restaurants and eateries is irrelevant to nearly 1 in 3 ski tourists

A total of 43 per cent of Danish ski tourists responded “not applicable” when asked whether they are satisfied or dissatisfied with “good food at restaurants and eateries” during their holidays in Norway. This indicates that they do not take advantage of the food and beverage offerings when on a skiing holiday in Norway. “Only” 20 per cent of Swedes responded the same and only a small minority of Brits (3.5%) and Germans (10%) say that they consider eateries and restaurants to be not applicable on their holidays in Norway.

How satisfied or dissatisfied are you with the following?

The proportion of “Not Applicable”.



Topic 3: Activities and satisfaction

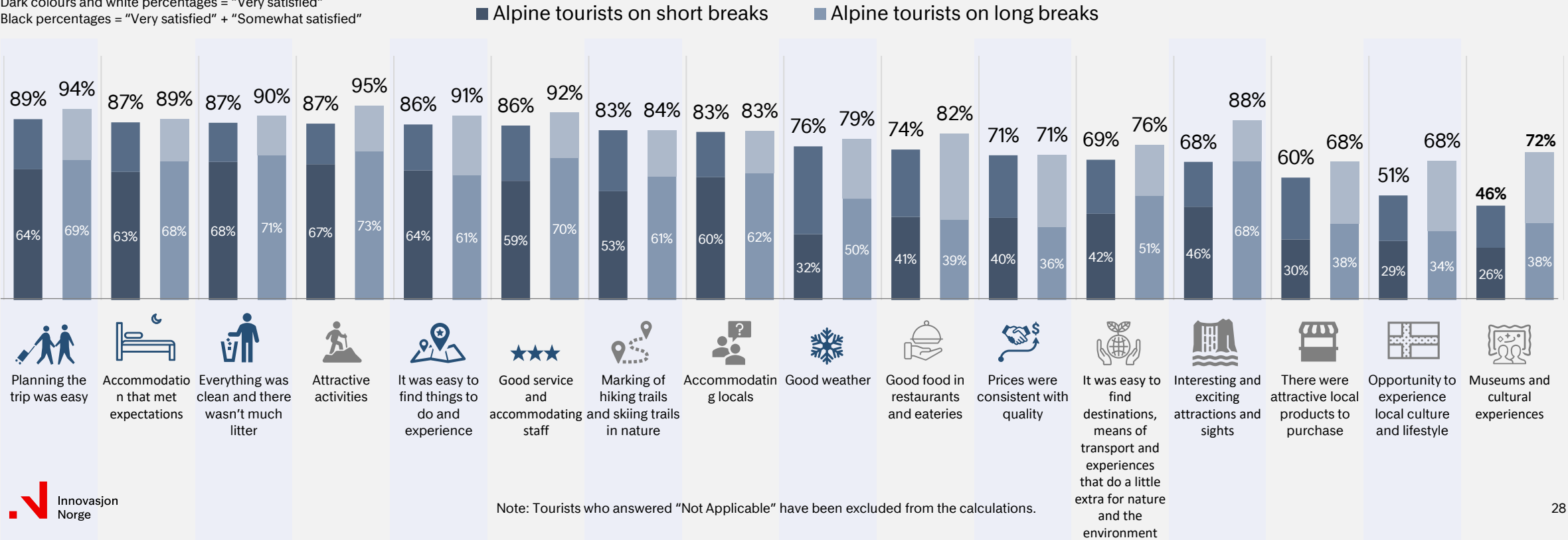
4 in 10 are very satisfied with the price in relation to quality

Foreign ski tourists are most satisfied with the activities on offer and a whole 70 per cent are very satisfied with an attractive activity offering. This is higher for ski tourists than for winter tourists in general. Ski tourists are also much more satisfied with the price in relation to quality than other winter tourists and much more satisfied than they were in 2019. During the 2024 winter season, 38 per cent said that they were very satisfied with the price in relation to quality. Of Danish ski tourists, 53 per cent are very satisfied with the price in relation to quality. In 2019, only 12 per cent of ski tourists were very satisfied with the price in relation to quality.

How satisfied or dissatisfied are you with the following?

The proportion of "Somewhat" and "Very" satisfied.

Dark colours and white percentages = "Very satisfied"
Black percentages = "Very satisfied" + "Somewhat satisfied"



Topic 3: Activities and satisfaction

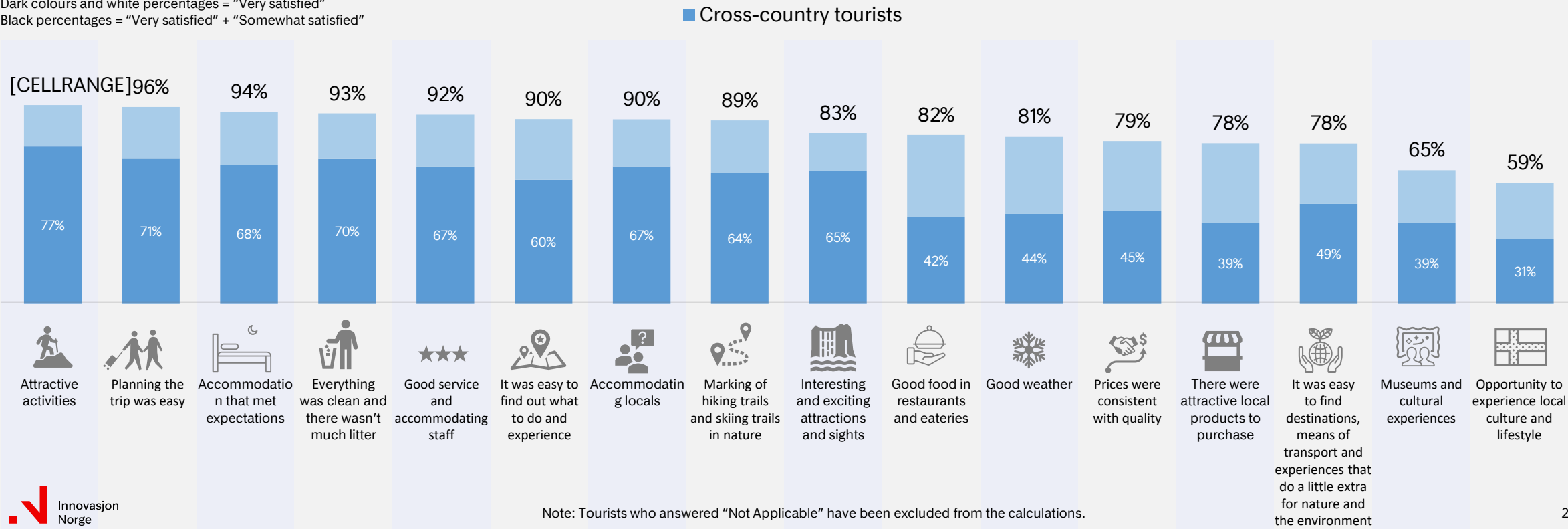
Cross-country tourists are most satisfied

In general, both alpine tourists and cross-country tourists are more satisfied compared to 2019, while cross-country tourists are still somewhat more satisfied.

How satisfied or dissatisfied are you with the following?

The proportion of "Somewhat" and "Very" satisfied.

Dark colours and white percentages = "Very satisfied"
Black percentages = "Very satisfied" + "Somewhat satisfied"





Topic 5: **Sustainability and Ski Tourism**

To what extent do ski tourists consider nature and climate before and during their holidays? How does this affect their behaviour during their skiing holidays in Norway?

Topic 4: Sustainability and Ski Tourism

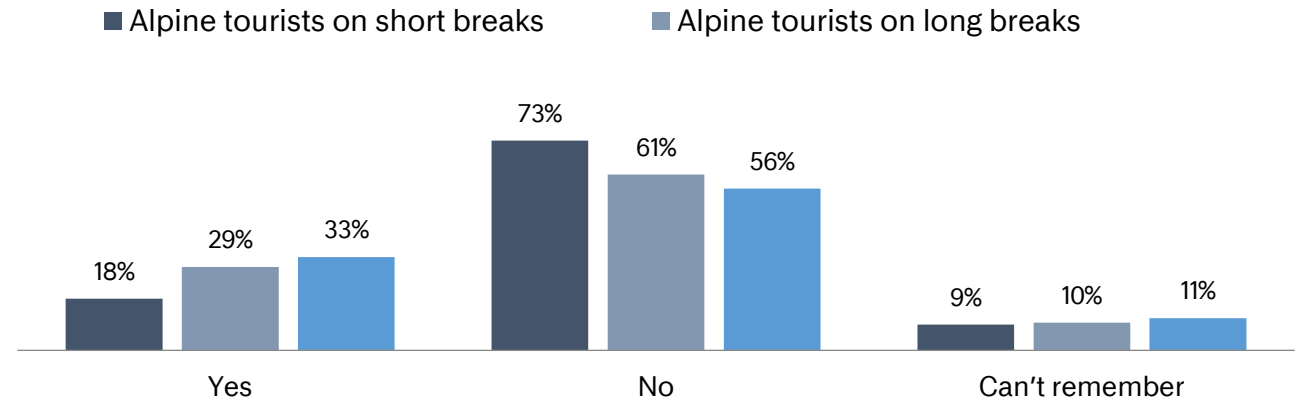
The importance of sustainability in the planning and selection of destinations, means of transport and experiences

Only 23 per cent of alpine tourists and 33 per cent of cross-country tourists actively check whether stakeholders look after nature or are climate-friendly when planning their skiing holidays. Around 1 in 10 actively avoid destinations or means of transport for reasons of the climate.

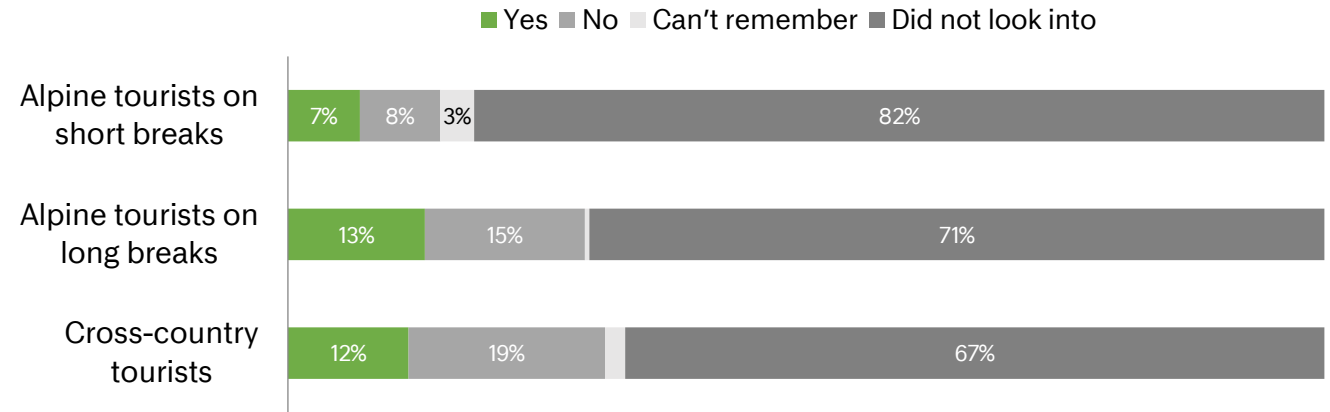
This is around the same level as last year's winter season. Danish winter tourists are least interested in the climate and environment (19%) followed by the Swedes (30%).

For all other markets, a minimum of 4 in 10 state that they have taken nature or climate into account when planning their holidays.

During the planning of this trip, did you look into whether the destination(s), mode(s) of transport and/or experience(s) are environmentally friendly or climate-friendly?



When deciding where to go, were there any destinations, modes of transport and experiences you did not choose out of consideration for nature and/or the climate?

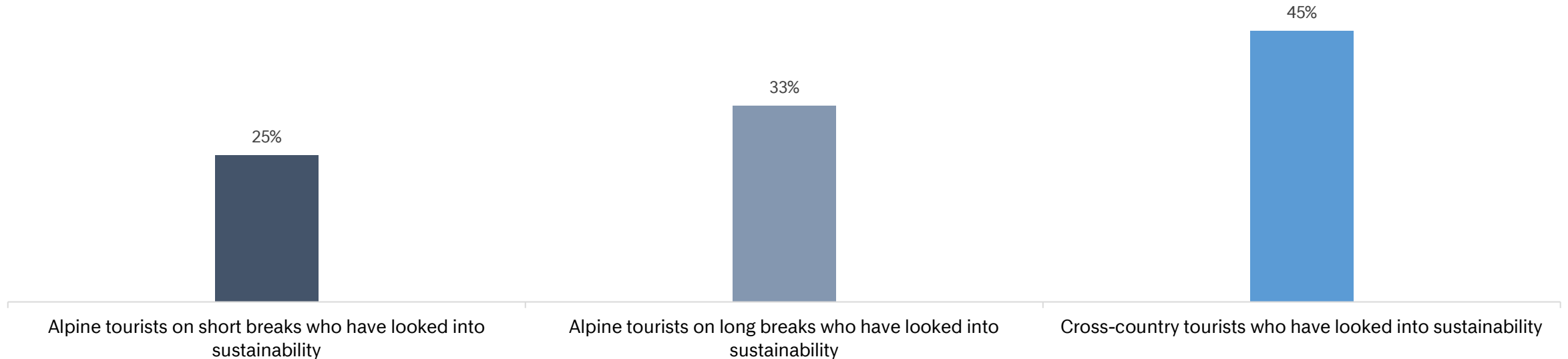


Note: Percentages below 3% have not been included in the graph.

Not easy to find stakeholders who make an extra effort for nature and the environment

Only 23 per cent of alpine tourists and 33 per cent of cross-country tourists actively check whether stakeholders look after nature or are climate-friendly when planning their skiing holidays. It is concerning that so few, especially of the alpine tourists who are interested in sustainability, find it easy to find destinations, modes of transport and experiences that make an extra effort for nature and the environment. Those who are interested in sustainability are considerably more interested in making sustainable choices both when planning their holidays and during their holidays.

How satisfied or dissatisfied are you with the following? It was easy to find destinations, means of transport and experiences that do a little extra for nature and the environment
The proportion who responded "Very satisfied" and have looked into sustainability.

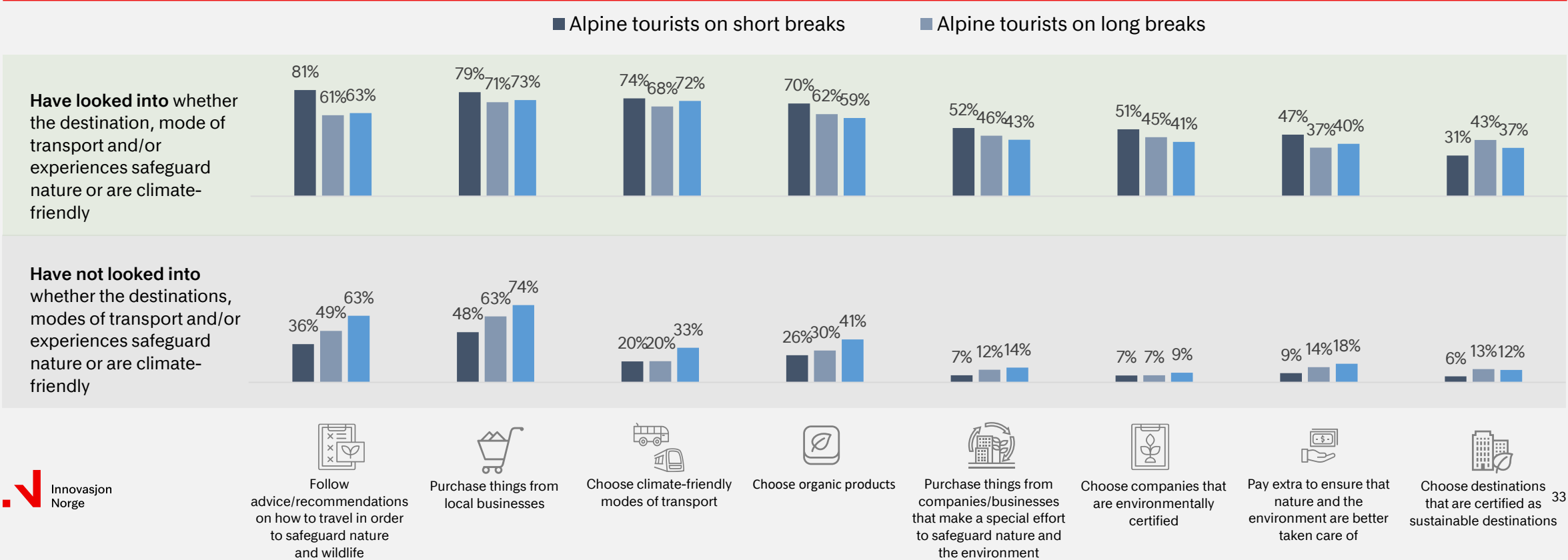


The ski tourists who have looked into whether stakeholders look after nature and the climate before their holidays make more sustainable choices during their holidays

23 per cent of ski tourists say that they are willing to pay more to ensure that nature and the environment are looked after. Cross-country tourists are somewhat more positive, this is because these tourists increasingly originate from markets outside of Scandinavia. Tourists from Germany, the UK and Southern Europe are more willing to pay to protect nature and the environment.

On this trip in Norway, are you going to or have you done any of the following in order to safeguard nature, the environment and the climate?

The proportion of tourists who responded "Yes" to whether they have done or plan to do the following during their holidays





Topic 6:

Target groups for skiing holidays in the markets

Potential for ski tourism in Sweden, Denmark, Germany, the Netherlands and the UK.
Summary of the findings from Innovation Norway's target group study from December 2023.

Target groups for skiing holidays in five markets



5

country/market: Denmark, Sweden, Germany, the Netherlands and the UK



724 / 6,828

respondents/interviews



802 / 18,582

holidays in the last 3 years



652 / 7,511

mapped skiing holidays with detailed data (segmentation data)



Skiing in Denmark, Sweden, Germany, the Netherlands and the UK



All tourism in Denmark, Sweden, Germany, the Netherlands and the UK

Focus on skiing holidays from selected markets

This part of the report presents selected findings from the target group study for the main foreign ski markets; **Sweden, Denmark, Germany, Netherlands and the UK.**

The study was conducted in December 2023. The purpose of the study was to develop a joint knowledge platform for Norwegian tourism with insight into the needs and expectations of different target groups when it comes to holidays, as well as to provide more insight into competition and Norway's position in relation to different types of holidays. Innovation Norway will actively use the insights to contribute to strengthening Norway's competitiveness.

Data collection and segregation

The target group for the study was active tourists who had travelled abroad in the last three years and who are interested in travelling abroad in the next three years. Holidays that make up a small proportion of the total market but that are of relevance to Norwegian tourism have been prioritised in data collection. This applies to **skiing holidays**, sports and active holidays, health and well-being, culinary holidays, hiking holidays, cycling holidays and adventure holidays.

You can find more information about the target groups across different holiday types in "Target groups and Norway's position" from July 2024 and more about Norway's brand and competition in the report "Norway's brand and market position".

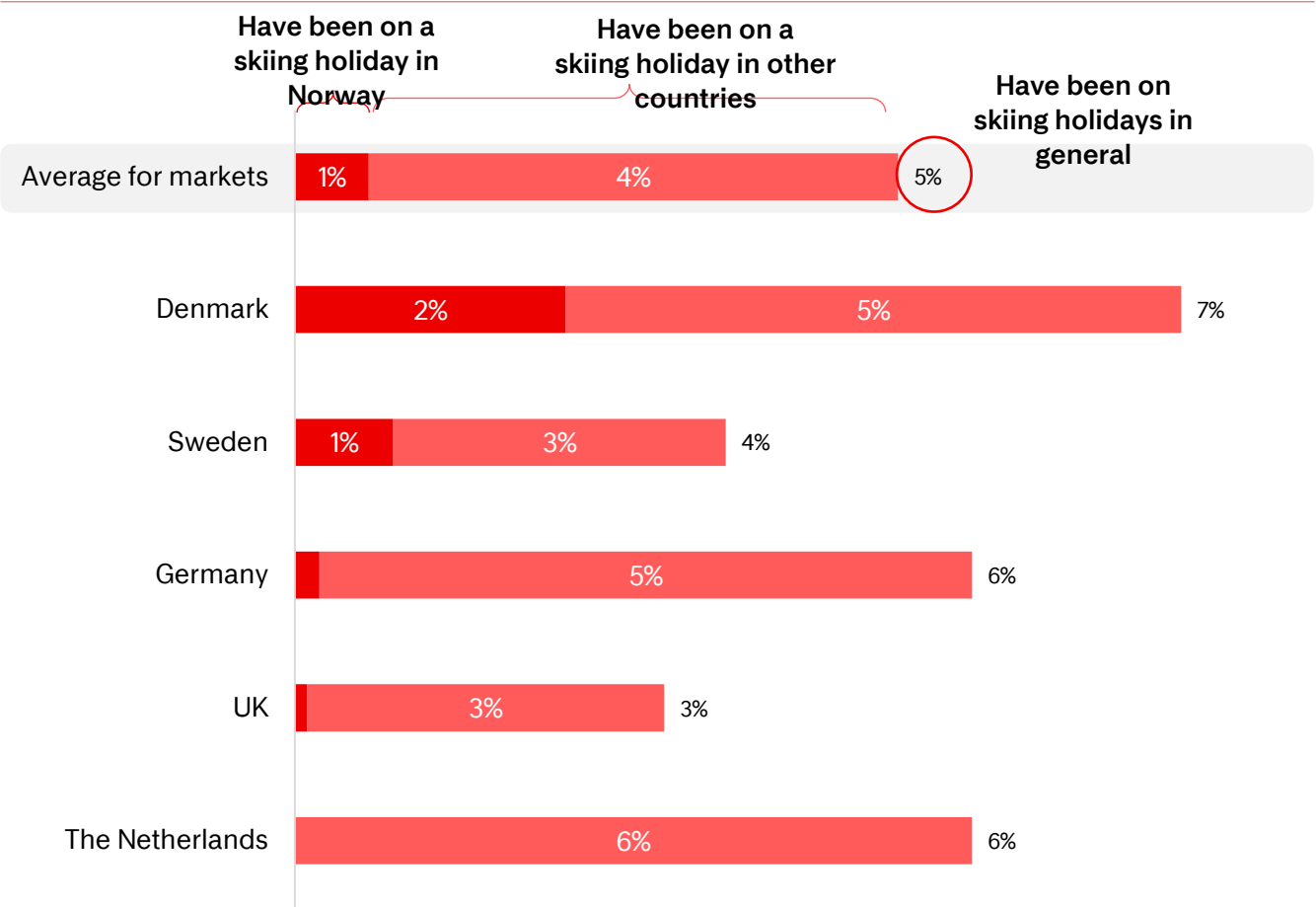
5% of active holidaymakers from Denmark, Sweden, Germany, the Netherlands and the UK have been on skiing holidays in the last 3 years

Holidaymakers were asked to classify their foreign holidays based on a list of different holiday types, including skiing holidays.

They were also asked about their interest in different types of holidays abroad in the future.

5 per cent of active holidaymakers have been abroad on a skiing holiday in the last three years. 1 in 5 skiing holidays in these markets was in Norway. Danes and Swedes were more likely to say that they had been on such a holiday in Norway. The proportion is considerably smaller in Germany and the UK. No-one in the Dutch market had been to Norway on a skiing holiday.

The proportion of active holidaymakers who **have been on skiing holidays** in Norway and/or **skiing holidays** in other countries in the last three years, as well as the total proportion of active holidaymakers who have been on skiing holidays

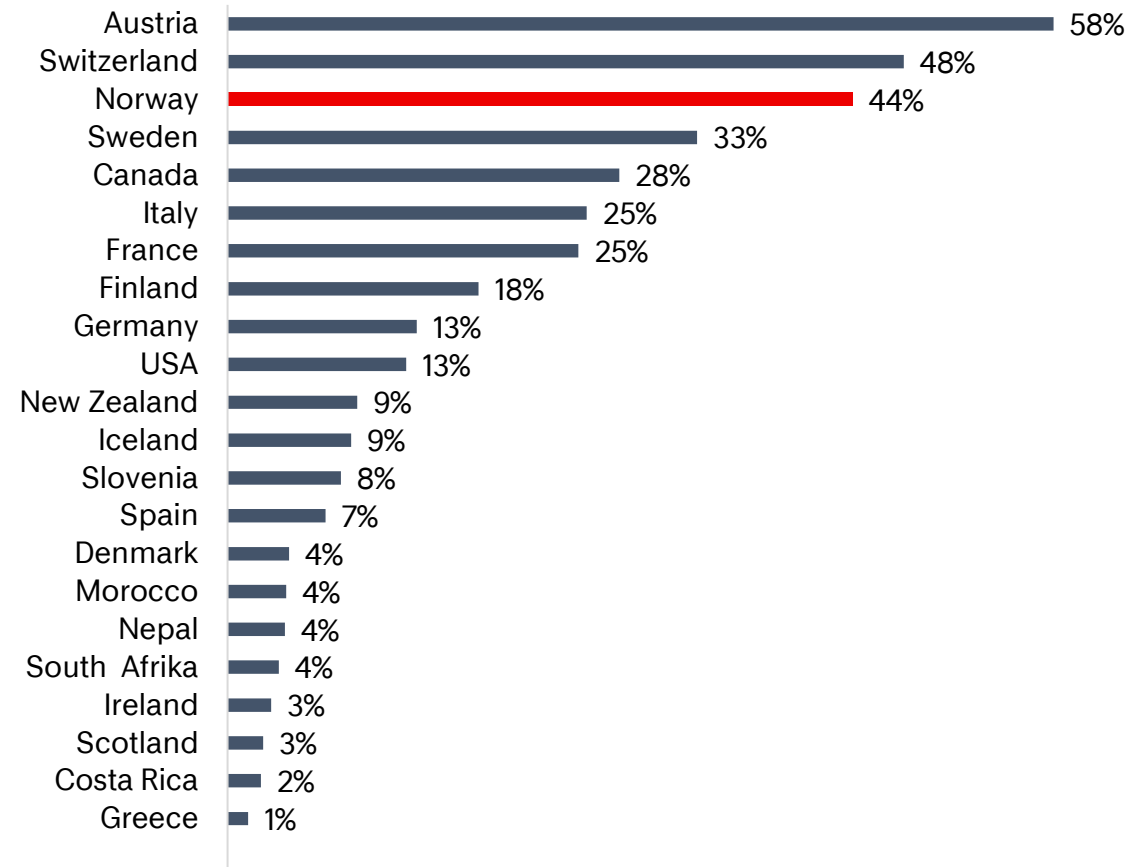


Norway is in the top 3 countries for those who are interested in going on a skiing holiday in the future

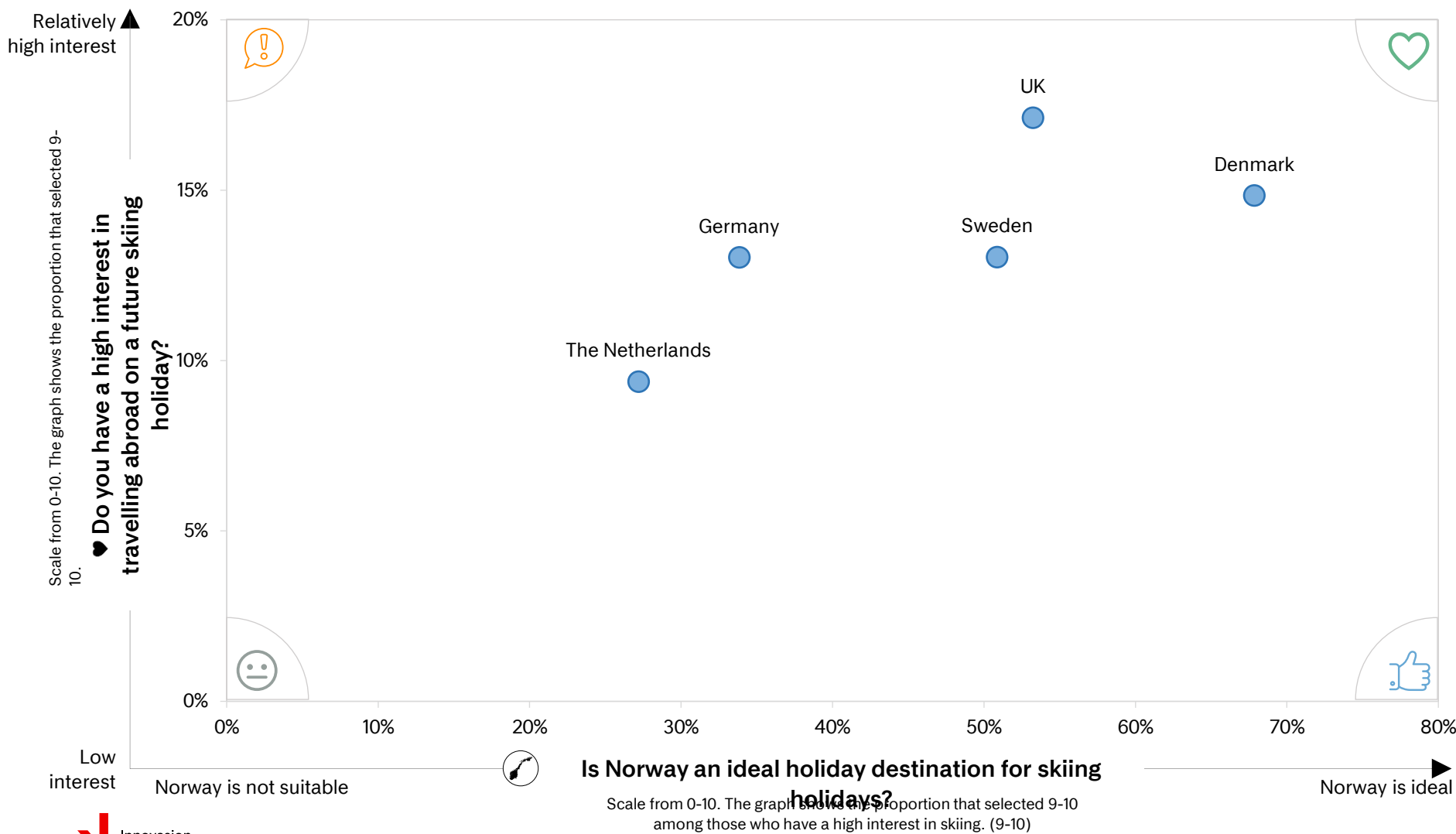
A total of 44 per cent of those who have been on skiing holidays in the last three years or who are interested in going on a skiing holiday in the future associate Norway with skiing holidays. In this question, holidaymakers were able to select from a long list of countries and were not asked about Norway directly.

Only Austria and Switzerland had greater associations with skiing destinations.

Which countries do active holidaymakers who **have been on a skiing holiday** or **want to go on a skiing holiday** associate most with skiing holidays?



Potential map for skiing holidays



The potential map shows how large a share of the respective markets are interested in going on a skiing holiday in the future (vertical axis) and how large a proportion of these responded that Norway is an ideal destination for skiing holidays (horizontal axis).

This means that, in the Danish market, 15 per cent of active holidaymakers are very interested in going on a skiing holiday in the future and 68 per cent believe that Norway is an ideal destination for skiing holidays.

More than 50 per cent of those who are very interested in going on a skiing holiday from the UK, Sweden and Denmark believe that Norway is an ideal destination for skiing holidays.

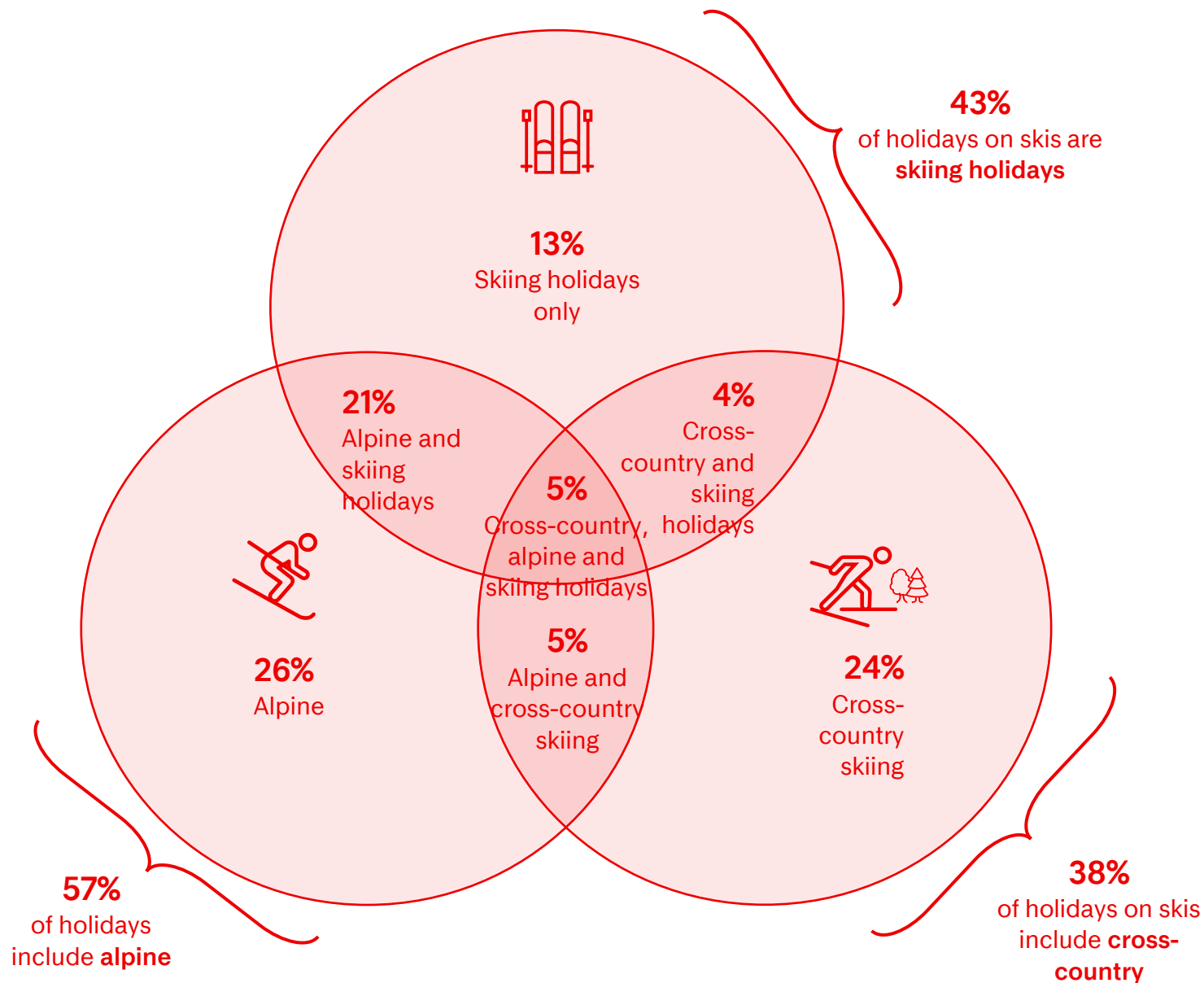
Definition of holidays on skis

There is great variety in the needs, activities and expectations tourists have when it comes to skiing holidays. There are many holidays that include skiing activities, but that holidaymakers do not classify as skiing holidays, such as city breaks, nature holidays, adventure holidays or holidays in the mountains.

Holidays on skis are defined as holidays abroad that satisfy at least one of the following criteria:

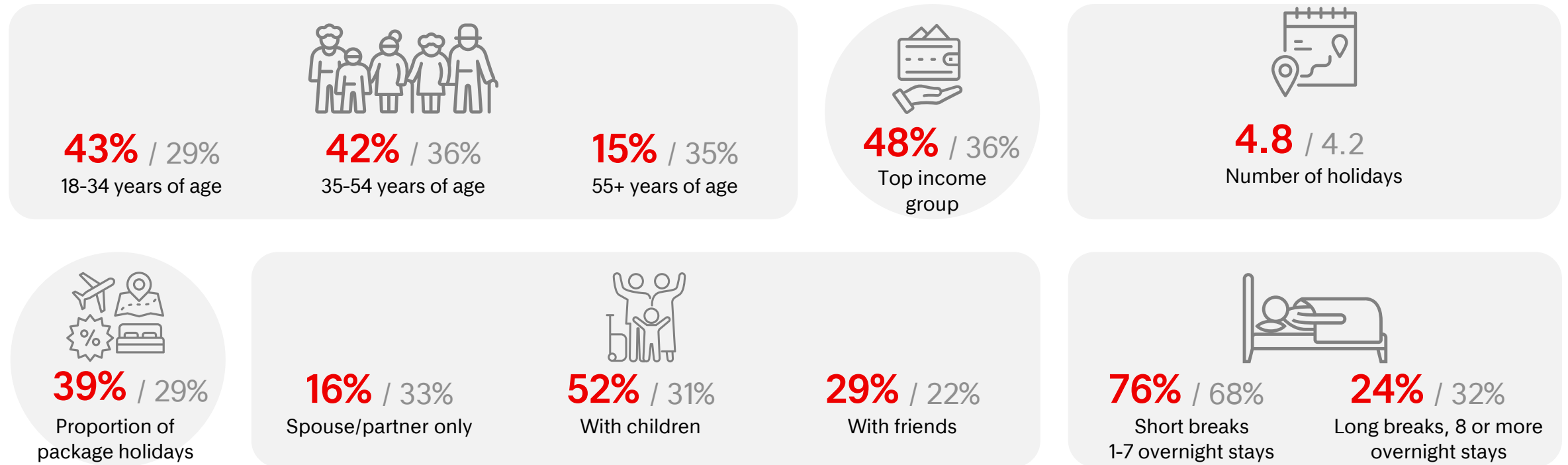
- is a **skiing holiday** and/or
- includes **alpine** and/or
- **cross-country skiing**.

The figure shows how **skiing holidays are distributed** between holidays that are skiing holidays, holidays with alpine and cross-country skiing and how these holidays overlap.



Who went on skiing holidays in the last three years?

Those who have been on skiing holidays in the last three years have many of the same characteristics as the ski tourists who visited Norway during the 2024 winter season. They are younger and more likely to travel with children and/or friends. 4 in 10 of those who go on skiing holidays are under 35 years of age. They are more likely to travel with children and 48% of holidays have a duration of 5-7 days. 4 in 10 skiing holidays are purchased as part of a package holiday. Those travelling on skiing holidays have a higher income and travel more than the average person.



A skiing holiday must satisfy several needs

A skiing holiday nearly always needs to satisfy several types of emotional needs.

Six key needs dimensions have been identified and these are suitable for understanding and explaining differences in needs and expectations across different holiday types. Skiing holidays differ from other holidays abroad in so far that they place greater emphasis on activity and movement.

The need to participate in physical activity (red) is sometimes combined with a need to achieve harmony and balance (blue) and at other times combined with strengthening relationships (brown) and sometimes adventurousness (orange) or pleasure (lilac).

The analysis of skiing holidays shows that the way in which these needs are combined is most suitable for distinguishing between different target groups for potential skiing holidays.

Activity and movement

The holiday must provide the opportunity to experience a lot and participate in physical activity.

Luxury and pleasure

The holiday must offer quality, luxurious pleasure and exclusive experiences.

Adventure and exploration

The holiday must provide the opportunity to be adventurous, explore the unknown and get out of your comfort zone.

Relationships and communities

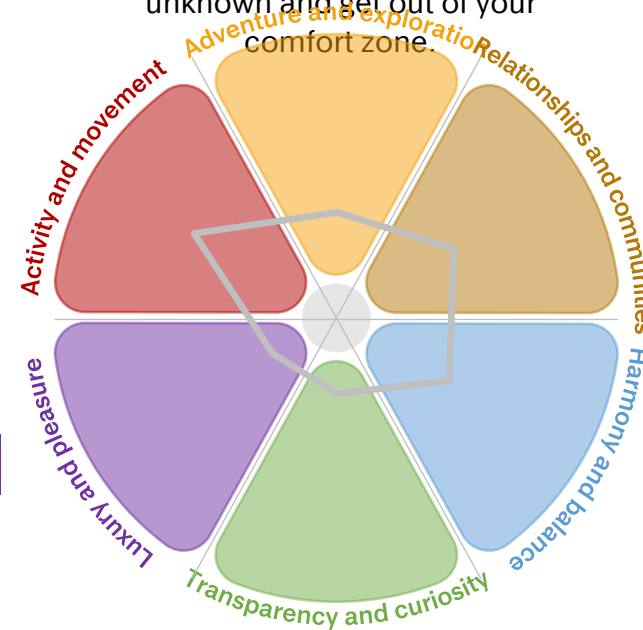
The holiday is about family time and spending time with friends, strengthening relationships and creating unforgettable moments of community and belonging.

Harmony and balance

The holiday is about creating harmony and balance, boosting mental well-being and/or improving health and lifestyle.

Transparency and curiosity

The holiday must offer the opportunity to expand horizons, learn something new and grow as a human.

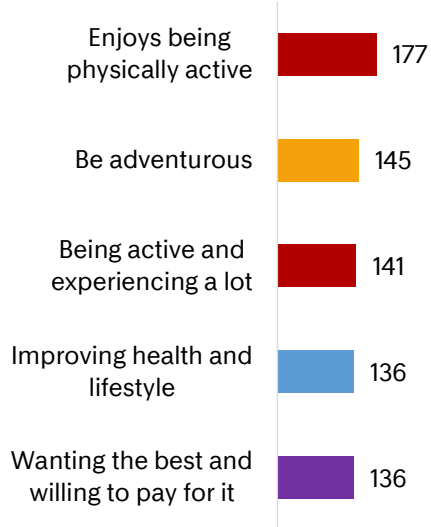


On skiing holidays, we want to be active and adventurous, experience a lot and improve our health and lifestyle

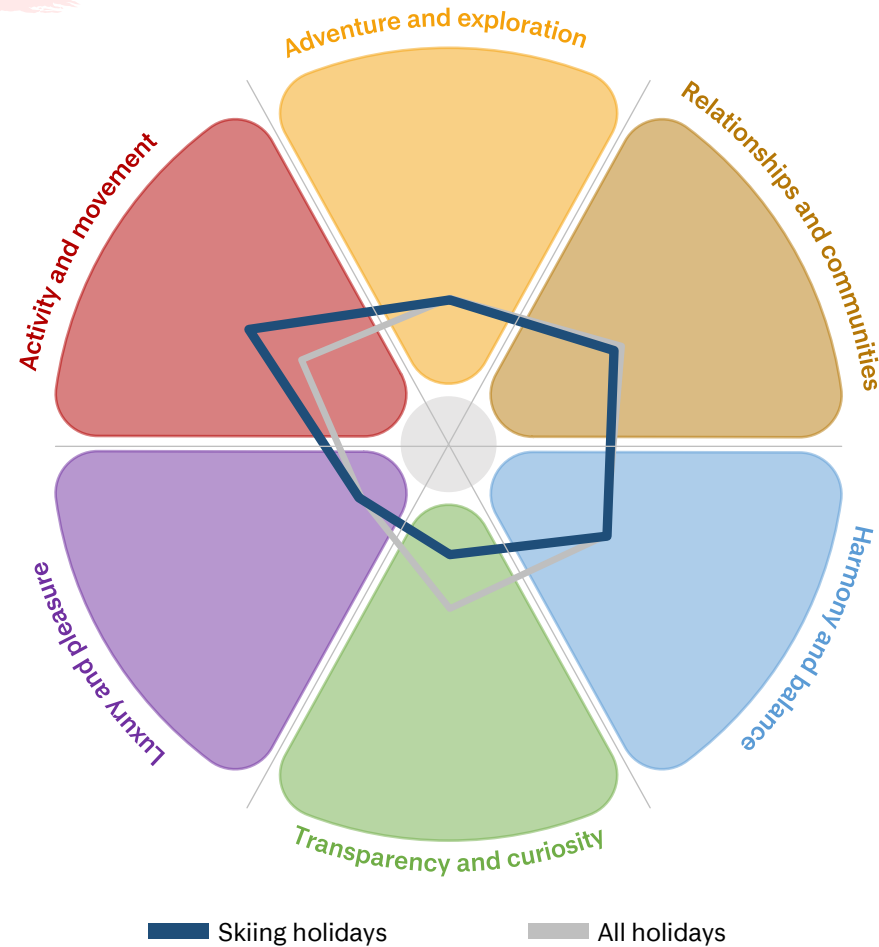
The holiday must...

... provide the opportunity to be physically active, experience a lot and be adventurous. At the same time, the holiday must contribute to improved health and lifestyle. To a greater extent, the skiing holiday must also be an opportunity for enjoyment – many people are willing to pay to get the best experience.

We want this more than the others...



Needs profile



Topic 6: Target groups for skiing holidays in the markets

Ski target groups with different needs combinations

When working on the [target group insights](#), nine different target groups were identified across markets and holiday types. You can read more about these target groups in the main report. There are consistently greater differences in needs and preferences between target groups than between markets.

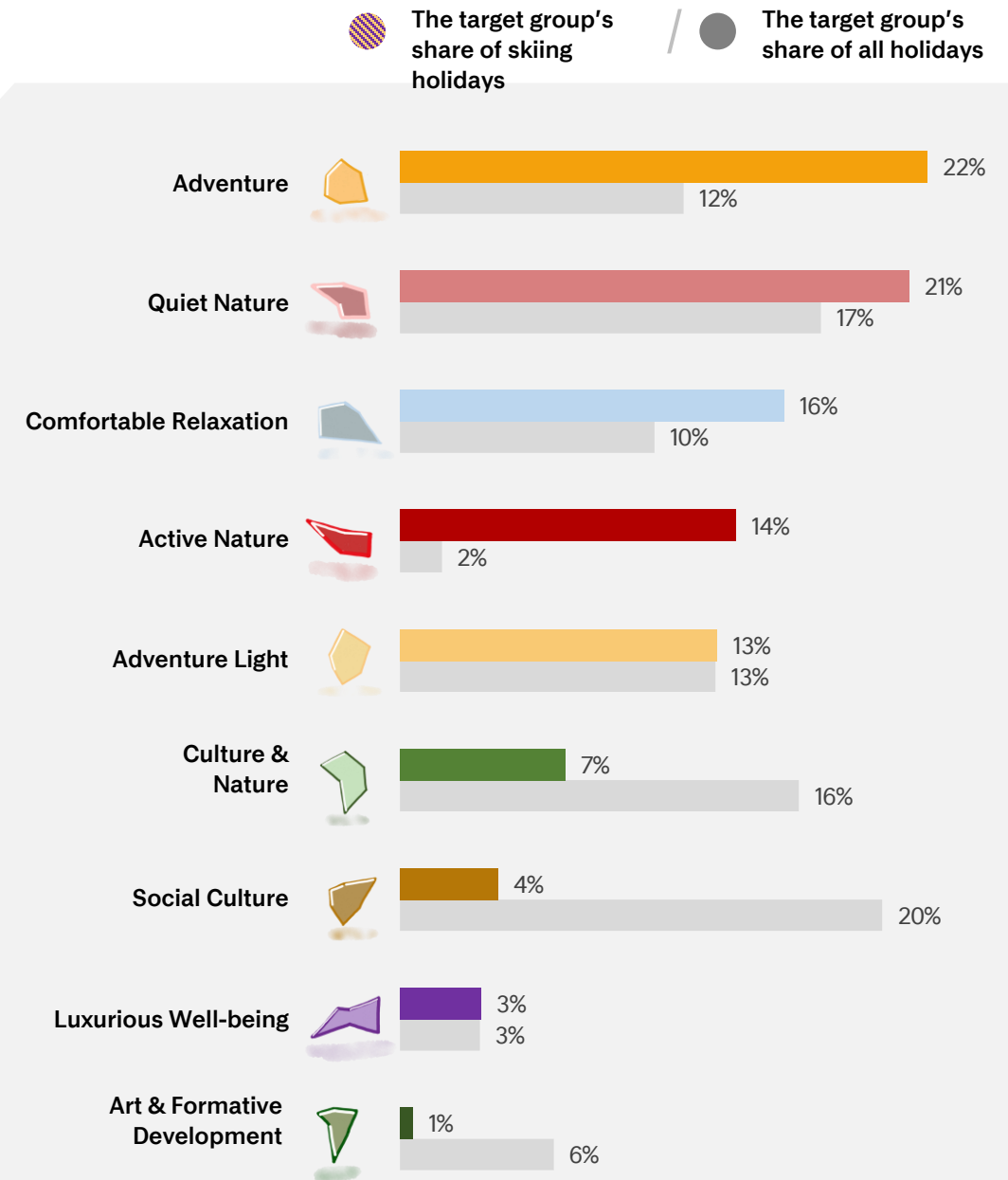
Here you can get a taste of the needs combinations that are important for skiing holidays.

Of the nine identified target groups, Adventure, Quiet Nature, Comfortable Relaxation and Active Nature are most relevant to skiing holidays.

For Quiet Nature and Active Nature, it is important to participate in physical activity and they score high in the Activity and movement (red) dimension. Active Nature is primarily concerned with skiing activities and do, to a greater extent, want to experience an adrenaline rush and excitement, while Quiet Nature increasingly want to combine skiing with other activities, particularly hiking.

For Adventure (and Adventure Light), the holiday must provide the opportunity to be adventurous and get out of their comfort zone. They would like to have access to many different types of experiences and activities during their skiing holiday and want to satisfy needs in most needs' dimensions. They often combine skiing with cities and natural phenomena.

Comfortable Relaxation go on very short breaks, and those who are on skiing holidays focus on skiing. The holiday must help improve health and lifestyle, harmony and well-being, preferably with an offering of exclusive restaurants and shopping (lilac).



Large difference between markets with regard to which target groups are important for skiing holidays

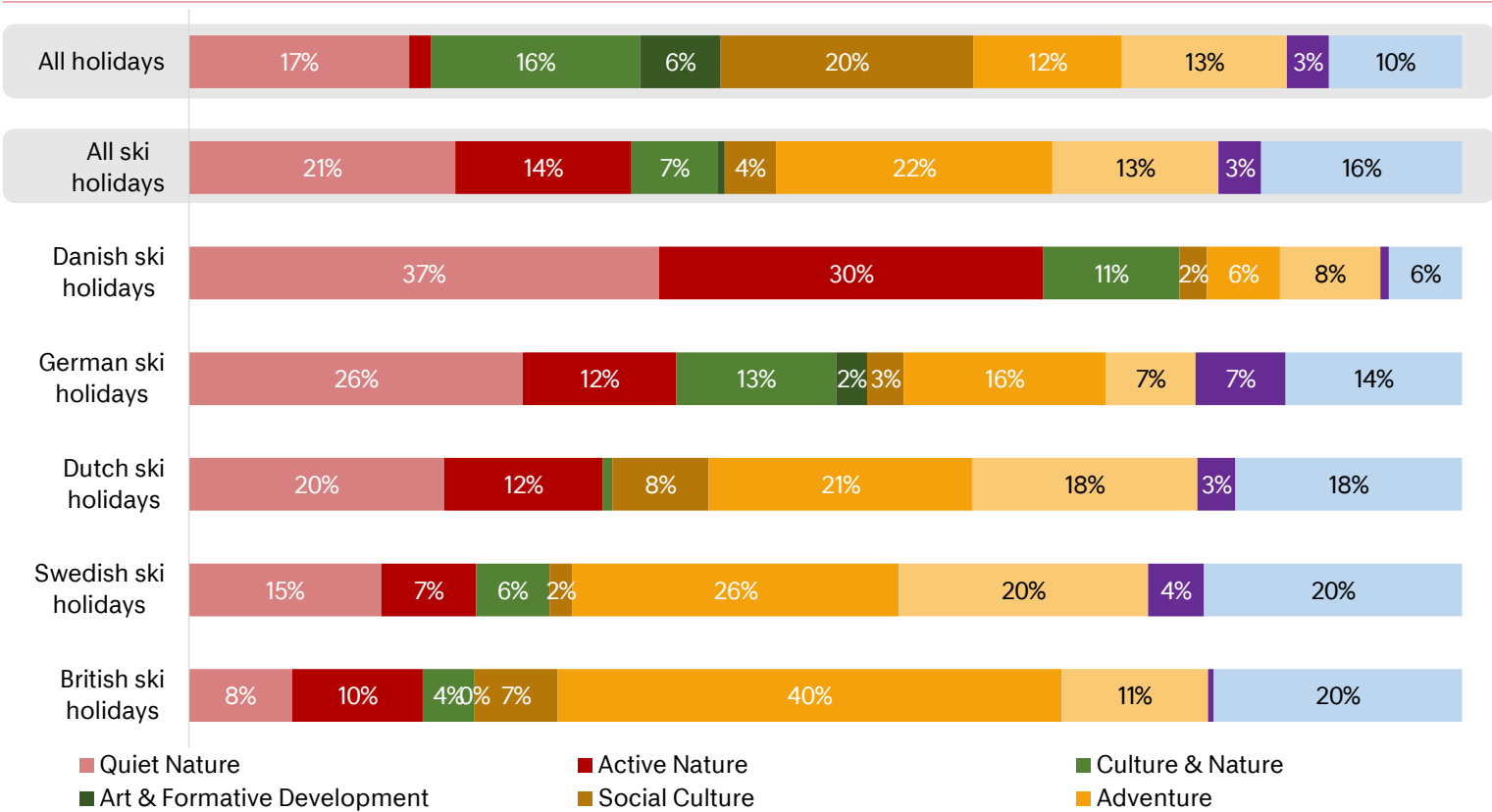
There are large differences between also, regard to which needs combinations a skiing holiday must deliver on. Adventure and Quiet Nature are the largest target groups by far.

The Danish market is clearly distinguished from the other markets as nearly 70 per cent of skiing holidays are Quiet Nature or Active Nature. Quiet Nature is also, the largest by far in Germany, while Adventure is the largest for skiing holidays in the UK, Sweden and the Netherlands.

Comfortable Relaxation and Adventure Light are the most important target groups in Sweden. These are the shortest holiday breaks for young holidaymakers. Adventure Light is more adventurous, and Comfortable Relaxation is more interested in harmony and balance.

Target group size (share of overnight stays)*

Target group share of overnight stays during holidays in each market



* Percentages below 2% have not been included in the graph.

Features associated with the skiing destinations

Those travelling on skiing holidays in Quiet Nature are most interested in nature and the surroundings, as well as the destination having a welcoming atmosphere. They want a broad range of outdoor activities and hiking opportunities. At the same time, they also want access to quiet zones and destinations that are not overcrowded.

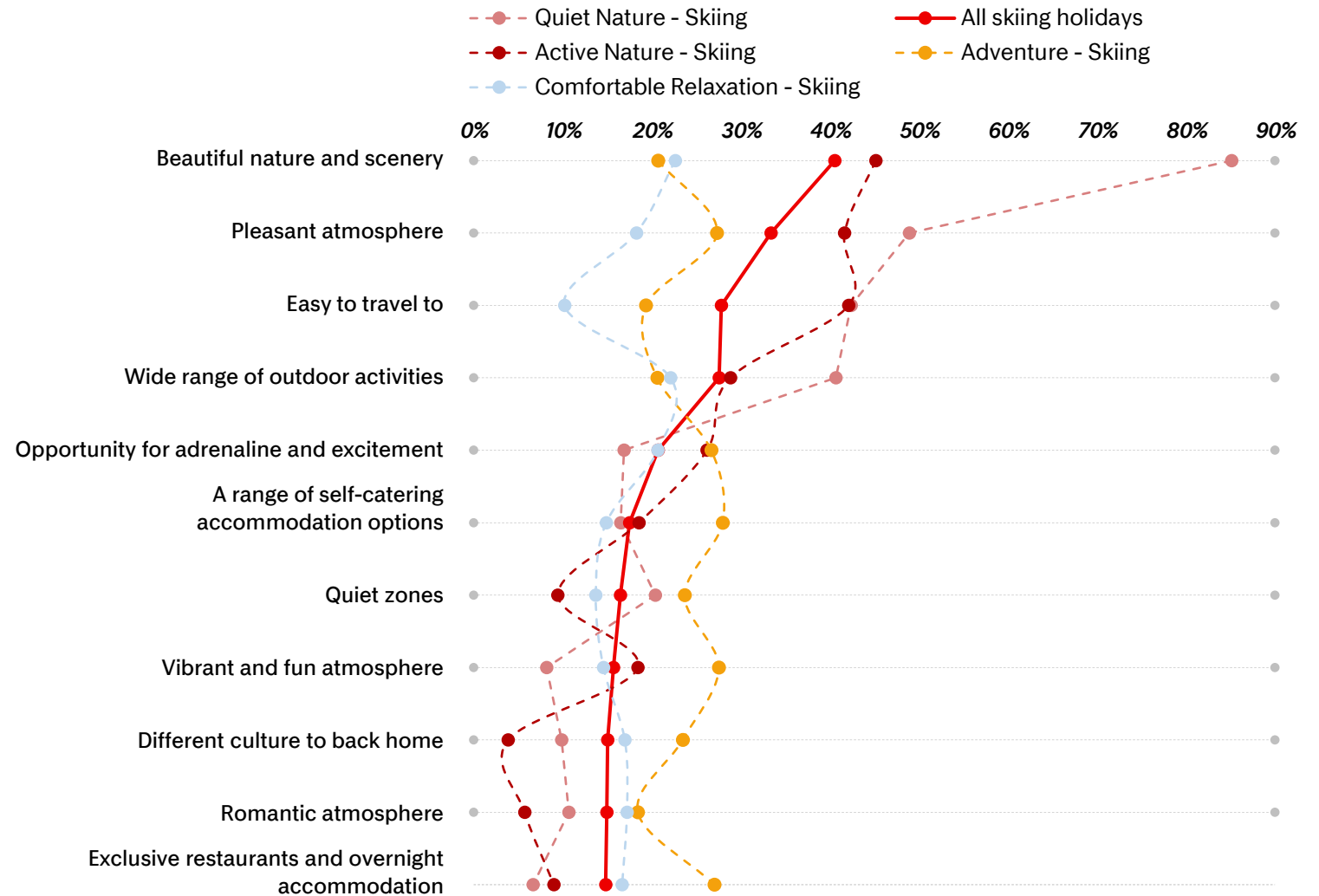
Active Nature is primarily interested in alpine skiing and all other features associated with the skiing destination clearly come second. It should be beautiful, welcoming and easy to travel to.

Adventure wants life and vibrancy and is more interested in exclusive restaurants, a vibrant nightlife and opportunities for adrenaline and excitement. They prefer self-catered accommodation and (other) budget-friendly options.

Comfortable Relaxation wants a menu of outdoor activities to choose from. These are very short breaks focusing on the skiing activities and this young target group is more interested in exclusiveness and romance than on average.

What qualities and features should the holiday experience ideally have?

The proportion of skiing holidays for which selected features have been specified



Activities and experiences during the skiing holiday

Quiet Nature will primarily combine skiing activities with relaxation, good food and short hikes in nature. Spa and well-being is also important to many of the respondents in the target group.

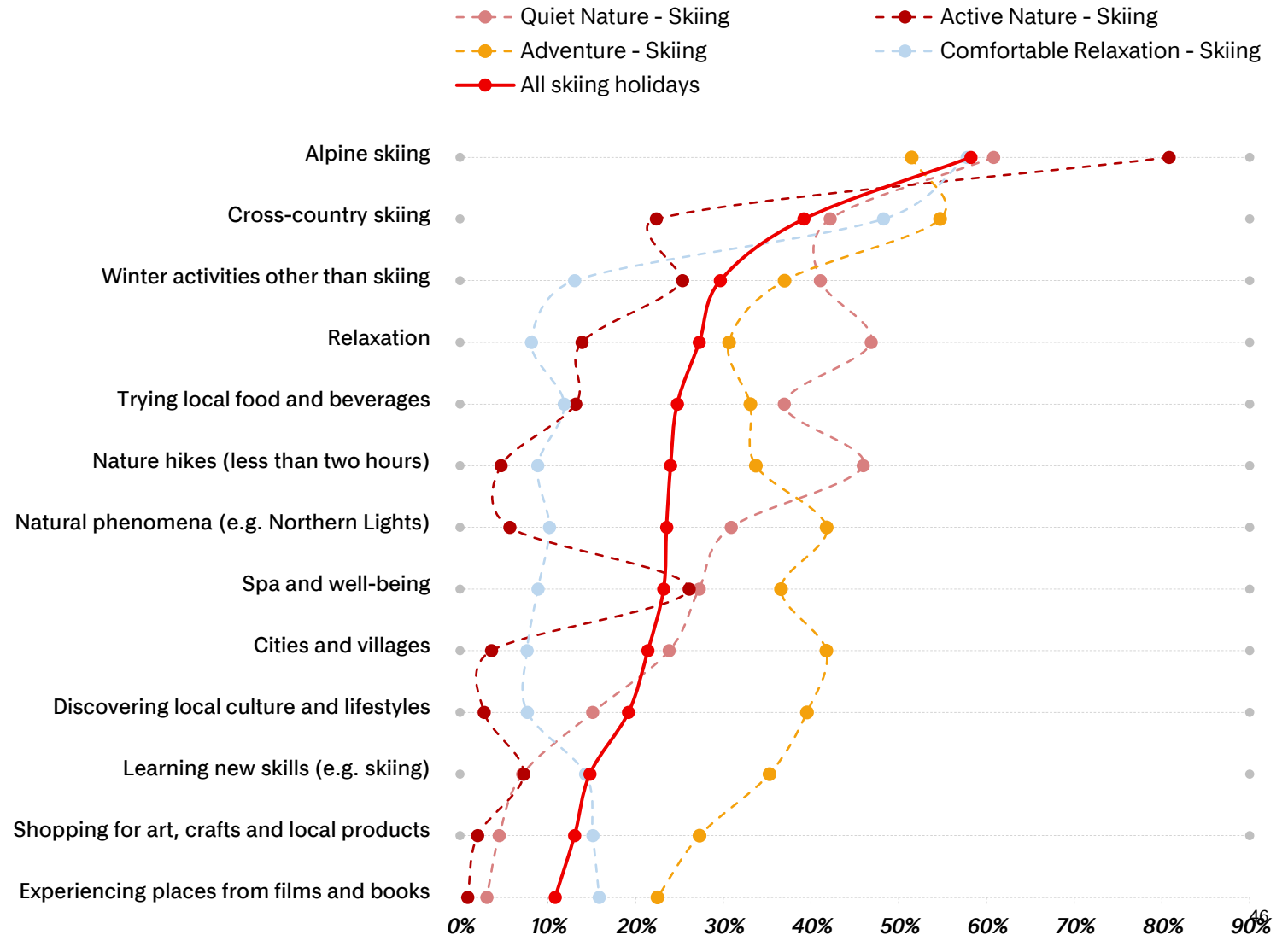
Active Nature is primarily alpine, often with spa and well-being after a long day on the slopes and a nice dinner in the evening. Other winter activities provide a great supplement to skiing, but alpine is most important for these.

Adventure would also like access to interesting natural experiences (such as the Northern Lights) and city experiences combined with skiing. They want to learn and make exciting new discoveries during their holidays.

Comfortable Relaxation is primarily interested in skiing, but they are also interested in shopping and learning new skills on skiing holidays. They are happy to visit places they know from films, series and books.

What activities should the holiday experience ideally provide?

The proportion of skiing holidays for which activities have been specified



Needs and expectations for the holidays

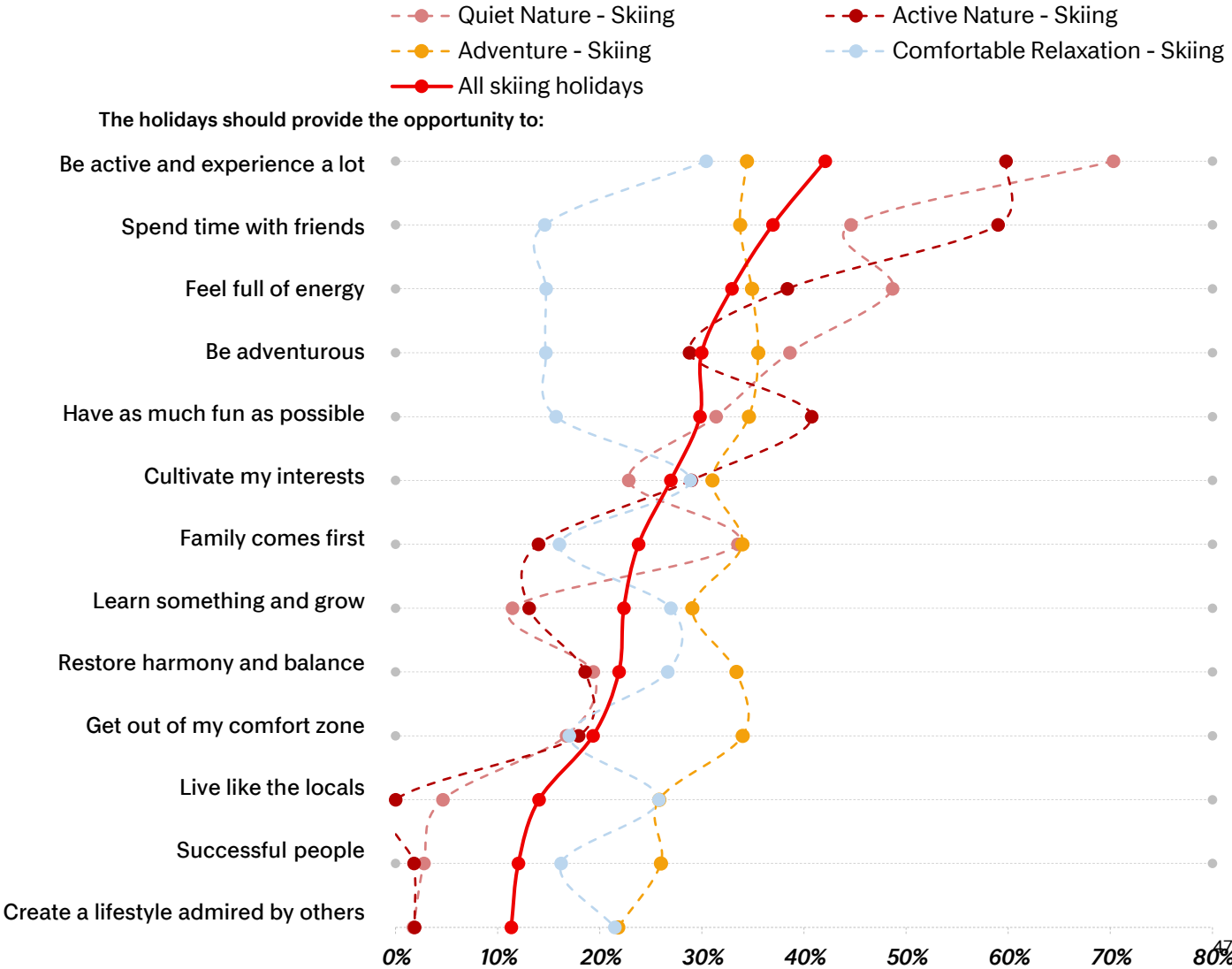
Quiet Nature primarily wants to be physically active and explore nature. The skiing holiday will boost energy levels and provide an opportunity to be adventurous and have fun. They are more interested in the natural experience as a source of energy.

Active Nature wants physical activity and fun with friends. They want to cultivate their interests (in skiing). It provides an energy boost and a sense of freedom.

Adventure is more interested in getting out of their comfort zone and restoring harmony and balance. Adventure has a wide range of expectations for the holidays. It must create energy, harmony and, to a greater extent, a lifestyle admired by others.

Comfortable Relaxation wants to cultivate interests, learn and grow and preferably acquire new skills during their skiing holidays. They are more interested in creating a lifestyle admired by others and believe that skiing holidays are a great fit for successful people.

What activities should the holiday experience ideally provide?
The proportion of skiing holidays for which activities have been specified





Appendix:

Data, methodology and definitions

Overview of data, number of interviews and methodology for the weighting of data.

Definition of terms

Term	Definition
Tourist	A tourist in Norway is defined as a person travelling in Norway outside their usual surroundings for more than one day, but for less than half a year (or 183 days). If the latter is not the case, the person is regarded as residing in Norway and is therefore not considered a tourist.
Ski tourist	A ski tourist in Norway is defined as an international holidaymaker who has stated that they have participated in or plan to participate in at least one skiing activity during their holidays in Norway.
Other winter tourist	A foreign holidaymaker who has visited Norway during the winter season but who cannot be defined as a ski tourist.
Travelling companions	Travelling companions refers to the number of people travelling together.
Other expenditure	Other expenditure includes the tourists' expenditure in addition to transport, accommodation, outdoor activities, cultural activities and package holidays. This could include the purchase of groceries, items from cafeterias and kiosks, restaurants, etc.
Package holidays	A holiday purchased as a package holiday from a supplier, i.e. a package including at least two of the following services: transport, accommodation, ski pass/ski school, two or more meals per day, activities/excursions.
NPS	<p>Net Promoter Score (NPS) is a tool for gauging one type of loyalty and, in this context, it specifies the percentage of tourists who would recommend the area as a holiday destination. NPS is calculated on the basis of the following question: "On a scale of 0 to 10, where 0 is very unlikely and 10 is very likely, to what extent would you recommend Norway as a tourist destination to others?". Those who enter a score of 0 to 6 are described as being <i>critics</i>, those who enter a score of 7 or 8 are described as being <i>passive</i>, and those who enter a score of 9 or 10 are described as being <i>ambassadors</i>. The NPS value is defined as the percentage of tourists who are ambassadors, minus the percentage of critics, i.e. $NPS = \% \text{ ambassadors} - \% \text{ critics}$.</p>

Data and methods

This report takes a closer look at foreign ski tourists in Norway during the 2024 winter season. The table on the right shows the number of responses from foreign holidaymakers in Norway divided between ski tourists, alpine tourists, cross-country tourists and other winter tourists.

Data was collected by Norstat during the winter of 2024 (January to April). The interviews were based on a sampling plan established on the basis of the overnight accommodation statistics administered by Statistics Norway (SSB). Tourists were interviewed at attractions, overnight accommodation, airports, ports, ski resorts, etc.

Respondents who either responded that they have been in Norway for more than 6 months or that they are not staying in Norway overnight have been excluded from the analysis. Overnight accommodation at hotels, campsites or cabin clusters (registered types of accommodation) is weighted by accommodation level with a weighting calculated on the basis of the hotel, camping and cabin cluster accommodation statistics from Statistics Norway (SSB). Overnight accommodation at other types of accommodation (unregistered types of accommodation) is weighted based on the distribution in the data and the overall distribution of overnight accommodation from all enterprises.

The weighting functions such that the individual respondent is weighted to represent a proportion of the population. The weighted respondents therefore represent the total population. In order to prevent individual respondents being of disproportionately significant importance, the maximum weighting has been trimmed such that each respondent is not given too high a weighting. In this way, the guests with many overnight stays are weighted more heavily than guests with few overnight stays, but without individual guests being able to disproportionately affect the averages. When we estimate an approximate number of overnight stays, this is done based on the assumption that the random sample is representative of commercial tourism.

Number of interviews with foreign holidaymakers (ski tourists and other winter tourists) who stayed in Norway overnight during the 2023 winter season

	Foreign
ski tourists	1022
Alpine tourists on short breaks	406
Alpine tourists on long breaks	297
Cross-country tourists	358
Other winter tourists	2388
Total	3410

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